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ABSTRACT

This basic course is designed for persons who have been involved in training but who lack apprenticeship in training theory, design, and delivery. The purpose of the course is to increase participants' knowledge of the following areas and skills: learning theory, group process, needs assessment, writing training goals and behavioral objectives, selecting curriculum, designing training sessions, delivering training sessions, evaluating training, making interventions, and adapting training materials. The training strategy combines didactic instruction and experiential learning with such varied training methods as lectures, demonstrations, task-group exercises, guided group discussions, and individual reading assignments. Learning activities are designed to facilitate large-group and small-group interactions and to provide trainees with an opportunity to practice skills they can use on the job. Each module provides new information to be presented, analyzed, and applied in practice sessions. The evaluation methodology incorporates written objective tests, simulations, trainer self-evaluations, and trainee feedback. The manual contains not only the course content but charts and forms for each module, task performance guidelines, materials and handouts related to the lectures, a bibliography and a glossary. (Author/LS)

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TRAINING OF TRAINERS

Resource Manual

by

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Revised May 1977

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This course was developed to expand the theoretical and applied knowledge of beginning trainers. I hope that it will encourage innovative approaches to a variety of training problems and issues. I would like to express my appreciation to those who helped me when I first began training: to Jessie Deloch, who influenced my thinking on training design; to Guy Tinsley, who taught me to trust the group; to Bill Link whose skills, sensitivities, and insights were a continual challenge to me; and to Al Fleming and the staff of NJCATI who developed a generation of trainers as well as some fine training materials. Many thanks to Beth Jacobs Gillispie who developed the original module on trainer interventions.

There are not words enough to express my appreciation to Normandie Kamar, editor of the Trainer's Manual and Resource Manual: if ever two books were a joint undertaking between author and editor, these were. Special thanks to the following people: to Ellen Seercy who reviewed this manuscript; to Margo DeBerry, Mary Pulling, and Linda Hamner for typing it all; and to Margo DeBerry and Virginia Burchett for graphics.

Ann R. Bauman
May, 1977

INTRODUCTION

No single training course can provide all the information or practice needed before one can call himself a trainer, not even a course called *Training of Trainers*. Training is a process of some science and much art in which technical skills and interpersonal skills are equally important. People become trainers by serving an apprenticeship; by designing, conducting, and evaluating many different types of training programs; and by attending as many training courses as possible. Training of trainers courses provide new information and insights, an environment for skill development and practice, and the opportunity to learn from other trainers and to share ideas.

This *Training of Trainers* is a basic course, designed for persons who have been involved in training but who lack apprenticeship in training theory, design, and delivery. The purpose of this course is to increase participants' knowledge of the following areas and skills in their use. They are essential areas that should be mastered by every trainer.

- Learning theory
- Group process
- Needs assessment
- Writing training goals and behavioral objectives
- Selecting curriculum
- Designing training sessions
- Delivering training sessions
- Evaluating training
- Making interventions
- Adapting training materials

COURSE GOALS

Upon completion of the course, each participant will have increased knowledge and skills in the areas of:

- Learning theory and its application to training design and delivery

- Dynamics of group process
- Establishing a training climate that is conducive to learning
- Training design: theory and application
- Techniques for presenting and processing information
- Making interventions as a trainer
- Adapting training materials to meet the needs of specific trainee populations

TRAINING METHODOLOGY

The training strategy combines didactic instruction and experiential learning. Various training methods are used to make the learning process most effective: lectures, demonstrations, task-group exercises, guided group discussions, and individual reading assignments. Learning activities are designed to facilitate large-group and small-group interactions and to provide trainees with an opportunity to practice skills they can use on the job. Each module provides adequate time for new information to be presented, analyzed, and applied in practice sessions. The evaluation methodology incorporates written objective tests, simulations, trainer self-evaluations, and trainee feedback.

COURSE MATERIALS

Training materials consist of a Trainer's Manual and a Resource Manual.

The Trainer's Manual contains all of the course-specific information the trainer will need:

- Goals and objectives of the course
- Time/Activity sheets that contain:

  Training schedule with time allocations

  Training tasks and the materials and equipment needed for each task

  Training activities that specify expected trainer and trainee behaviors

  Logistical details

- Trainer guidelines, process notes, and instructions for each exercise

- Detailed lectures and supplementary information

The Resource Manual contains the basic information that the trainer and trainee should master. It includes:

- Course content
- Charts and forms used in each module
- Guidelines for task performance
- Papers, articles, and handouts related to lectures
- Bibliography and glossary

TIME REQUIRED FOR COURSE DELIVERY

The *Training of Trainers* course is composed of ten modules, each approximately 3 1/2 hours long. The total training time is 35 hours.

The modular organization of the course lends itself to a variety of delivery approaches. The course could be delivered in one- or two-module segments over an extended period of time, and it could be incorporated as part of a credentialing program for drug abuse staff. For a five-day delivery, the course schedule would be as follows:

COURSE SCHEDULE

DAY ONE--MONDAY

Module I: Introduction to Learning Theory; The Learner

- How Adults Learn
- The Three Domains of Learning
- Learning Principles and Their Relation to Training Design

Module II: Interpersonal Communication and the Group Process

- The Process of Communication: Feedback
- Group Process
- Member Roles in Groups

DAY TWO--TUESDAY

Module III: From Needs Assessment to Behavioral Objectives

- Review: Models of Group Development
- The Roles of the Trainer in the Training Process
- Needs Assessment
- Training Goals
- Behavioral Objectives

Module IV: Designing Training Activities

- Learning Tasks
- Selecting Appropriate Curricula
- How to Design Training Activities
- Using Appropriate Methodology
- Using Training Aids

DAY THREE--WEDNESDAY

Module V: Small Group Presentations (Preparation)

- Technical Assistance to Small Groups re: Training Design

Module VI: Small Group Presentations (Delivery and Feedback)

- Presentation and Critique

DAY FOUR--THURSDAY

Module VII: Individual Presentations

- Presentation and Critique

Module VIII: Evaluation

- How to Evaluate Training in terms of:

  Participants Reactions

  Learning

  Behavior Change

  Results

- Using Evaluation Data to Improve Training

DAY FIVE--FRIDAY

Module IX: Trainer Interventions

- Theory and Application

Module X: Using Training Materials

- What is a Training "Package"
- How to Use Packaged Courses with your Trainee Population

MODULE I:

INTRODUCTION TO LEARNING THEORY: THE LEARNER

MODULE I: INTRODUCTION TO LEARNING THEORY: THE LEARNER

PERSPECTIVE

The purpose of this module is to orient participants to the Training of Trainers (TOT) course, establish a climate conducive to learning, define training, describe the training process, and review learning principles. This module includes:

- Registration
- Administering the Pretest
- Structured Experience: The Name Game
- Overview: The TOT Course
- Structured Experience: Likes and Expectations
- Structured Experience: Assumptions About Adult Learning
- Mini-Lecture/Discussion: Hilgard's Grouping of Learning Principles
- Mini-Lecture: Dale's "Cone of Experience"
- Structured Experience: How Do You Learn Best?
- Mini-Lecture/Discussion: Three Domains of Learning
- Structured Experience: The Three Types of Learning

BEHAVIORAL OBJECTIVES

Using the information presented in Module I as criteria, at the end of this module, and without the aid of notes, participants will be able to:

1. Define the following terms:

   Learning
   Training

2. Identify the purpose of training
3. Identify the four phases of the training process
4. Identify at least two components of each phase of the training process

5. a. Identify the three levels of learning

   b. Identify at least one example of each level

6. Identify at least five assumptions about how adults learn that are used in the TOT course

7. a. Identify at least four learning activities depicted in Dales's "Cone of Experience"

   b. Identify the relative effectiveness of each as a training technique

8. a. Identify the three domains of learning

   b. Identify at least one example of behavior in each domain

9. Given one principle from Hilgard's Grouping of Learning Principles, identify its relevance to training design

MODULE I: INTRODUCTION TO LEARNING THEORY: THE LEARNER

TRAINERS' NAMES ______________ ______________

______________ ______________

PRETEST

The pre- and posttests are given to help the trainer measure the learning that occurred as a result of the training course. The tests are *not* an evaluation of individual participants.

THE NAME GAME, A STRUCTURED EXPERIENCE

Goal

The goal of the Name Game is to introduce everyone.

Description

State your first name and one descriptive comment about yourself. The next person will repeat your name and comment and add his own. (Each participant must state all previous names and comments before adding his own.) After six people have spoken, the seventh person begins a new round until all participants have spoken.

Comments

OVERVIEW OF THE TOT COURSE

The Purpose of Training

As defined in the TOT, the purpose of training is to help people improve their job performance.

Definitions of Learning and Training

Learning is a process that takes place within the individual.

> Learning involves change. It is concerned with the acquisition of habits, knowledge, and attitudes. It enables the individual to make both personal and social adjustments. Since the concept of change is inherent in the concept of learning, any change in behavior implies that learning is taking place or has taken place. Learning that occurs during the process of change can be referred to as the learning process (Crow and Crow, 1963).
>
> Learning is shown by a change in behavior as a result of experience (Cronbach, 1963).

Training is a sequence of experiences, a series of opportunities to learn.

> . . . learning is precisely what training is all about. Training exists to bring about learning. Training is a . . . (structured) process, a sequence of experiences, a series of opportunities to learn, in which the trainee is exposed in some more or less systematic way to certain materials or events. The trainee's behavior is supposed to be modified by means of this process so that after it is completed he behaves in some way that is different

from the way he behaved before training. Training is what is done to the trainee (Folley, 1967).

Unfreezing Behavior (Miles, 1973)

1. The learner enters a safe situation and, in a sense, "unfreezes," or relaxes, his usual set of ways of behaving.
2. In the unfrozen, fluid state he creatively explores and tries out new behaviors.
3. He refreezes, or makes firm, the new behaviors as he moves back to the usual demands of the job situation.

. . . Training's biggest contribution is in making a temporary thaw not only possible, but safe and desirable.

Three Levels of Learning

1. Knowledge: the amount of information, facts, or concepts that a person knows
2. Skill: the skills that a person exhibits
3. Attitude: the attitudes a person develops and imparts to others

Four Phases in the Training Process

1. Needs Assessment
    a. Identifying system characteristics
    b. Identifying job performance standards
    c. Identifying learner population characteristics
    d. Identifying training needs
2. Development
    a. Developing training goals
    b. Writing behavioral objectives
    c. Developing a curriculum outline
    d. Researching specific content information and training methodologies
    e. Writing the training design (selecting appropriate training strategies)

   - f. Compiling course content, resource papers, etc.
   - g. Preparing for delivery

3. Delivery

   - a. Managing the training session
   - b. Participating as a member of the training team
     - *1) Presenting course content*
     - *2) Facilitating structured experiences*
     - *3) Processing training activities*

4. Evaluation

   - a. Measuring change in terms of
     - *1) Reaction to training*
     - *2) Learning derived from training*
     - *3) Behavior change resulting from training*
     - *4) Results (or impact) of training on the projects that participants represent*
   - b. Using information obtained from evaluation to revise training

Course Focus

This course focuses on two of these phases of the training process: development and delivery.

Training Schedule

Day One

Module I:	Introduction to Learning Theory: The Learner
Module II:	Interpersonal Communication and the Group Process

Day Two

Module III:	From Needs Assessment to Behavioral Objectives
Module IV:	Designing Training Activities

Day Three

Module V:	Small Group Presentations (Preparation)

Module VI:	Small Group Presentations (Delivery and Feedback)

Day Four

Module VII:	Individual Presentations (Delivery and Feedback)
Module VIII:	Evaluation

Day Five

Module IX:	Trainer Interventions
Module X:	Using Training Materials Developed within and outside of the NTS

LIKES AND EXPECTATIONS, A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to (1) help participants learn more about each other and (2) identify each person's expectations about the course.

Description

In the small groups describe two things you like about yourself and why you like them. After you have all discussed your likes, then talk about your expectations of the TOT course. Write the expectations on newsprint for a report to the total group. The only part of this structured experience that you will be asked to share with the total group is the list of expectations. Each group should select a spokesperson to report to the total group. At the end of twenty minutes, reassemble as a total group.

Comments

ASSUMPTIONS ABOUT ADULT LEARNING, A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to highlight some of the assumptions about adult learning that determine the design and delivery of training events.

Description

You will be asked to describe your assumptions about adult learning, for example, "Adults are still capable of learning new information." These will be listed on newsprint and training assumptions used in the design of the TOT course will be reviewed.

Comments

HILGARD'S GROUPING OF LEARNING PRINCIPLES (Hilgard & Bower, 1966)

Following is a lecture outline with space for notes provided.

I. Principles Emphasized in S-R Theory

A. The learner should be an *active*, rather than a passive listener or viewer.

B. *Frequency of repetition* is still important in acquiring skill and for retention through overlearning.

C. *Reinforcement* is important; that is, in repetition desirable and correct responses should be rewarded.

D. *Generalizations* and *discrimination* suggest the importance of practice in varied contexts, so that learning will become (or remain) appropriate to a wider (or more restricted) range of stimuli.

E. *Novelty* in behavior can be enhanced through imitation of models, though cueing, through shaping, and is not inconsistent with a liberalized S-R approach.

F. *Drive* is important in learning, but all personal-social materials do not conform to the drive-reduction principles based on food-deprivation experiments.

G. *Conflicts* and *frustrations* arise inevitably in the process of learning difficult discriminations and social situations in which irrelevant motives may be aroused. Hence, we must recognize and provide for merit resolution or accommodation.

II. Principles Emphasized in Cognitive Theory

A. The *perceptual features* of the problem given the learner are important conditions of learning--figure-ground relations, directional signs, organic interrelatedness. Hence, a learning problem should be so structured and presented that the essential features are given to the inspection of the learner.

B. The *organization of knowledge* should be an essential concern of the teacher or educational planner so that the direction from simple to complex is *not* from arbitrary, meaningless parts to meaningful wholes, but instead from *simplified wholes to more complex wholes.*

C. Learning is *culturally relative*, and both the wider culture and the subculture to which the learner belongs may affect his learning.

D. *Cognitive feedback* confirms correct knowledge and corrects faulty learning. The learner tries something provisionally and then accepts or rejects what he does on the basis of its consequences. That is, of course, the cognitive equivalent of reinforcement in S-R theory, but cognitive theory tends to place more emphasis upon a kind of hypothesis--testing through feedback.

E. *Goal-setting* by the learner is important as motivation for learning, and his successes and failures determine how he sets future goals.

F. *Divergent thinking*, which leads to inventive problem solving or the creation of novel and valued products, is to be nurtured along with convergent thinking, which leads to logically correct answers.

III. Principles from Motivation and Personality Theory

A. The learner's *abilities* are important, and provisions have to be made for slower and more rapid learners, as well as for those with specialized abilities.

B. *Postnatal development* may be as important as hereditary and congenital determiners of ability and interest. Hence, the learner must be understood in terms of the influences that have shaped development.

C. Learning is *culturally relative*; both the wider culture and the subculture to which the learner belongs may affect his learning.

D. *Anxiety level* of the individual learner may determine the beneficial or detrimental effects of certain kinds of encouragement to learn.

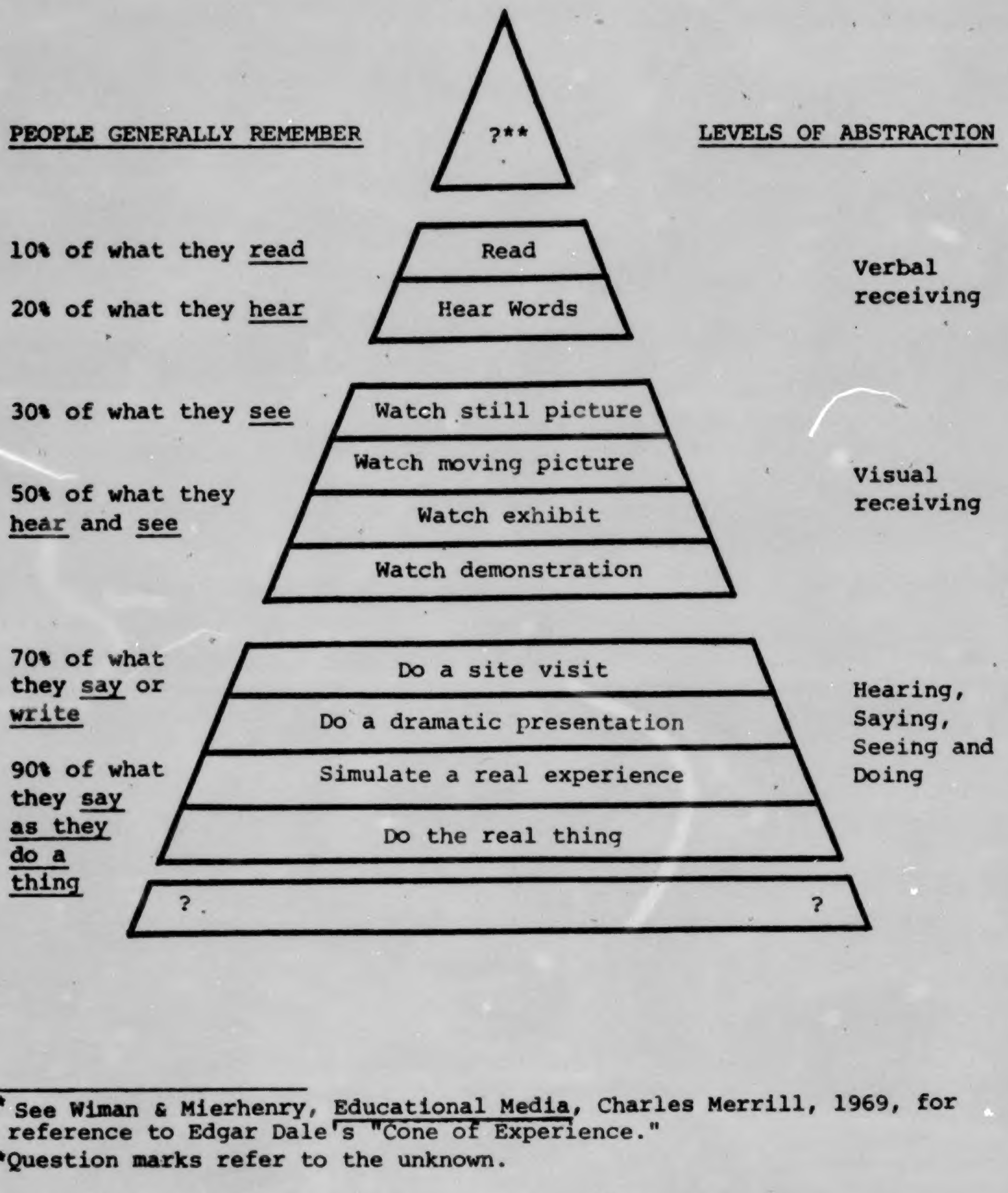
E. The same objective situation may tap *appropriate motives* for one learner and not for another, as for example in the contrast between those motivated by affiliation and those motivated by achievement.

F. The *organization of motives and values* within the individual is relevant. Some long-range goals affect short-range activities. Thus, college students of equal ability may do better in courses perceived as relevant to their majors than in those perceived as irrelevant.

G. The *group atmosphere* of learning (competition vs. cooperation, authoritarianism vs. democracy, individual isolation vs. group identification) will affect satisfaction in learning as well as the products of learning.

DALE'S CONE OF EXPERIENCE*

Below is a diagram of Dale's Cone.


PEOPLE GENERALLY REMEMBER
?**
LEVELS OF ABSTRACTION
10% of what they read
Read
20% of what they hear
Hear Words
Verbal receiving
30% of what they see
Watch still picture
Watch moving picture
50% of what they hear and see
Watch exhibit
Watch demonstration
Visual receiving
70% of what they say or write
Do a site visit
Do a dramatic presentation
Hearing, Saying, Seeing and Doing
90% of what they say as they do a thing
Simulate a real experience
Do the real thing
?
?

---

[*] See Wiman & Mierhenry, Educational Media, Charles Merrill, 1969, for reference to Edgar Dale's "Cone of Experience."

[**] Question marks refer to the unknown.

"HOW DO YOU LEARN BEST?" A STRUCTURED EXPERIENCE

Goal

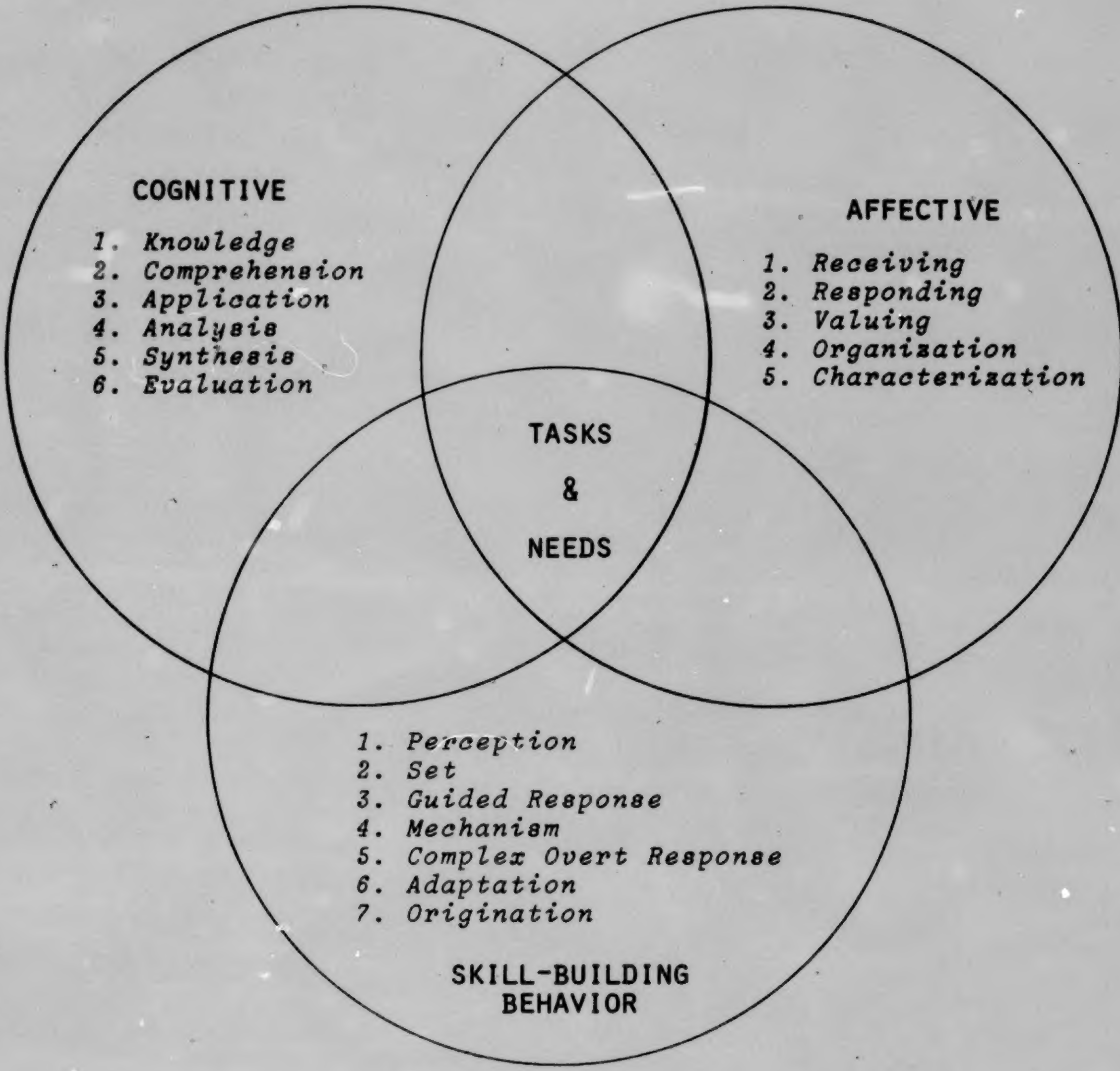
The goal of this structured experience is to explore similarities and differences about the ways people learn.

Description

In your small groups, discuss the ways you learn best. List these on newsprint for each person in your group. Select a new spokesperson to report to the total group.

Comments

THE THREE DOMAINS OF LEARNING*


COGNITIVE
1. Knowledge
2. Comprehension
3. Application
4. Analysis
5. Synthesis
6. Evaluation
AFFECTIVE
1. Receiving
2. Responding
3. Valuing
4. Organization
5. Characterization
TASKS
&
NEEDS
1. Perception
2. Set
3. Guided Response
4. Mechanism
5. Complex Overt Response
6. Adaptation
7. Origination
SKILL-BUILDING
BEHAVIOR

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*These categories of Cognitive and Affective Domains were adapted from Bloom's taxonomy in Bloom, Benjamin S., Hastings, J. Thomas, & Madans, George F. Handbook on Formative and Summative Evaluation of Student Learning. New York: McGraw-Hill, 1971. The categories for the Psychomotor Domain were adapted by Elizabeth J. Simpson of the U.S. Office of Education in The Classification of Educational Objectives in The Psychomotor Domain. Washington, D. C.: Gryphon House, 1972.

Following is a lecture outline with space for notes provided.

I. The Cognitive Domain

A. *Knowledge:* remembering facts, terms, and principles

B. *Comprehension:* understanding material studied without necessarily relating it to other material

C. *Application:* using generalizations or other abstractions appropriately in concrete situations

D. *Analysis:* breaking down of material into its constituent parts

E. *Synthesis:* rearranging and combining concepts and principles into new patterns

F. *Evaluation:* judging the value of material for specified purposes

II. The Affective Domain

A. *Receiving:* the willing acceptance of stimuli

B. *Responding:* interest in responding, the satisfaction derived from becoming involved with an act

C. *Valuing:* showing preference for selected activities, becoming committed

D. *Organization:* the construction of a system of values

E. *Characterization:* internalizing a value system, acting consistently with attitudes that have become characteristic

III. The Psychomotor Domain (Skill-Building Behavior)

A. *Perception:* the process of becoming aware of objects, qualities, or relations by way of the sense organs

B. *Set:* a preparatory adjustment or readiness for a particular kind of action or experience

C. *Guided response:* the development of abilities that are needed for a complex skill through imitation or trial and error

D. *Mechanism:* when learned response becomes habitual

E. *Complex overt response:* the level at which the learner can perform a complex skill

F. *Adaptation:* the altering of activities to meet the demands of new problems

G. *Origination:* the formulating of new ways of manipulating materials as a result of understandings, abilities, and skills developed in the psychomotor area

THE THREE TYPES OF LEARNING, A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to translate the concept of the three domains into specific examples of the different types of learning.

Description

After reading the Types of Learning Form, p. I-24, write one example for each type of learning. Read your examples for the cognitive domain; these will be listed on newsprint. Then give examples for the affective and behavioral domains.

Comments

TYPES OF LEARNING FORM

TYPES OF LEARNING
I. COGNITIVE (THINKING) -- Recalling and using information appropriately *(Give an example of cognitive behavior.)*
II. AFFECTIVE (ATTITUDES, VALUES, INTERESTS) -- Showing a preference for selected concepts; exhibiting feelings *(Give an example of affective behavior.)*
III. BEHAVIORAL (PSYCHOMOTOR) -- Performing an act or series of actions *(Give an example of skill building behavior.)*

SUMMARY AND OVERVIEW

Reading Assignment

Read "The Process of Communication," p. II-3, and "Role Functions in a Group," p. II-43, for discussion in Module II.

Use the space below for any notes.

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TOT TRAINING ASSUMPTIONS*

The training process followed in TOT is based upon certain assumptions; the most important of these are the following.

1. Learning may be defined as a change in behavior.
2. Participants bring with them a cluster of understandings, skills, appreciations, attitudes, and feelings that have personal meaning to them and that are in effect the sum of their reactions to previous experiences.
3. Participants have developed self-concepts that directly affect their behavior.
4. Learning requires activity on the part of the participants; they cannot be passive.
5. Ultimately, participants learn what they want to learn; they do not learn what they do not accept (or come to accept) as meaningful and useful.
6. Learning is enhanced when participants accept responsibility for their own learning.
7. Learning is directly influenced by the physical and social environment.
8. Learning is enhanced when the learning situation provides an opportunity to apply new information in as realistic a situation as is feasible.
9. Participants are more highly motivated when they understand and accept the purposes of the learning situation than when they do not.
10. Participants are motivated by experiences of success.
11. Participants tend to be motivated if they feel accepted by the trainer.
12. Participants are motivated when they can associate new knowledge with previous knowledge.
13. Participants are motivated when they can see the usefulness of the learning in their own personal terms.

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*Based on list in Teachers and Learners by Alfred Gorman, 1974.

MODULE II:

INTERPERSONAL COMMUNICATION AND THE GROUP PROCESS

MODULE II: INTERPERSONAL COMMUNICATION AND THE GROUP PROCESS

PERSPECTIVE

The purpose of this module is to provide participants with an opportunity to explore concepts and practice skills for improving communication and analyzing the group process. These concepts and skills are used throughout the course to enhance learning, and can be used by trainees in the design and delivery of training events. This module includes:

- Overview
- Discussion: The Process of Communication

    Definitions of "content" and "process"
    Three aspects of process communications skills
    The eight feedback rules
    Steps for giving feedback
    Pitfalls in feedback

- Structured Experience: Feedback
- Introduction to Group Process

    Definitions of "a collection of individuals," "a group," and "group process"

- Lecture/Discussion: Elements in Group Life

    Process elements in group life
    How to apply the process elements when conducting a training course

- Individual Learning Activity: Elements in Group Life
- Structured Experience: Process Elements in Group Life
- Discussion: Process Observations of Small Group Behavior
- Report Out: Decisions and Group Process
- Mini-Lecture/Discussion: Role Functions in Groups
- Summary and Overview

BEHAVIORAL OBJECTIVES

Using the information presented in Module II as criteria, at the end of this module, and without the aid of notes, participants will be able to:

1. Define the following terms:

   content
   process
   group
   group process
   group elements
   member elements
   contextual elements

2. a. Identify at least five of the eight feedback rules

   b. Demonstrate at least three of the eight feedback rules

3. Demonstrate Carl Roger's summary-repeat technique at least once.

4. Given a list of the process elements in group life, identify:

   a. at least three group elements
   b. at least three member elements
   c. at least two contextual elements

5. Given a hypothetical situation, identify at least 60% of the process elements in group life that a trainer should focus on when conducting counselor training.

6. Identify at least five role functions members perform in groups.

THE PROCESS OF COMMUNICATION

"The Process of Communication" will be discussed by the group in Module II. As you read the paper think about the following points:

1. The definitions of content and process
2. The listener's tendency to evaluate
3. Steps toward more effective listening
4. Three aspects of process skills

   Receiver needs
   The clarity of the message
   Personal responsibility

5. The eight feedback rules
6. Steps for giving feedback

Space for notes.

THE PROCESS OF COMMUNICATION

INTRODUCTION

This paper discusses three perspectives on the process of interpersonal communication. The first section consists of selections from W. Warner Burke's article, "Interpersonal Communication," in which he notes some of the problems that people have in trying to communicate and also discusses a few ways to improve our capabilities as communicators. The second section describes the two levels inherent in any communication, that of content and that of process, and focuses on three aspects of process skills that trainers can use to encourage open, spontaneous behavior. The third section discusses the concept of "feedback": eight feedback rules that can be used to facilitate interpersonal communication, steps to follow in giving feedback, and some common problems that can hinder effective feedback.

EFFECTIVE COMMUNICATION

Interpersonal Communication--The Sender

> Communication, by definition, involves at least two individuals, the sender and the receiver. Consider yourself, first of all, as the sender of some message. There are certain filters or barriers (internal) which determine whether or not the message is actually transmitted. These barriers may be categorized as follows: (1) Assumptions about yourself--Do I really have something to offer? Do I really want to share the information? Will others really understand? How will the communication affect my self-esteem? (2) Attitudes about the message itself--Is the information valuable? Do I see the information correctly, or understand it well enough to describe it to others? (3) Sensing the receiver's reaction--Do I become aware of whether or not the receiver is actually understanding? Or in other words, can I "sense" from certain cues or reactions by the receiver whether or not we are communicating?
>
> Now consider yourself as the receiver. As a receiver you may filter or not hear aspects (or any aspect for that matter) of a message. Why? Because the message may seem unimportant or too difficult. Moreover, you may be selective in your attention. For example, you may

feel that the sender is being redundant, so you quit listening after the first few words. You may be preoccupied with something else. Or your filtering or lack of attention may be due to your past experience with the sender. You may feel that "this guy has never made a point in his life and never will!"

Many times the receiver never makes use of his "third ear." That is, trying to be sensitive to nonverbal communication. The sender's eyes, gestures, and sometimes his overall posture communicate messages that the insensitive listener never receives.

There may be barriers that exist between the sender and the receiver, e.g., cultural differences. Environmental conditions may also cause barriers, e.g., poor acoustics. More common, however, are the differences in frames of reference. For example, there may not be a common understanding of purpose in a certain communication. You may ask me how I'm feeling today. To you the phrase, "How ya doing?" is nothing more than a greeting. However, I may think that you really want to know and I may tell you--possibly at length....

There is a fairly small percentage of people who speak articulately and clearly enough to be understood most of the time. Most of us have to work at it, especially when we are attempting to communicate a message which is fairly abstract or when we want to tell something which is quite personal or highly emotional. In sending the message effectively, we must do two things simultaneously, (1) work at finding the appropriate words and emotion to express what we want to say, and (2) continually look for cues from the listener to get some feedback even if we must ask our listener for some.

The Listener

In considering interpersonal communication, we might, at first thought, think that listening is the easier of the two functions in the process. If we assume, however, that the listener really wants to understand what the speaker is saying, then the process is not all that easy. The basic problem that the listener faces is that hs is capable of thinking faster than the speaker can talk. In their *Harvard Business Review* article, Nichols and Stevens state that the average rate of speech for most Americans is about 125 words per minute. Most of our thinking processes involve words, and our brains can handle many more words per minute than 125. As Nichols and Stevens point out, what this means is that, when we listen, our brains receive words at a very slow rate compared with the brain's capabilities....

Thus, a fundamental problem the listener must consider in the communicative process is the fact that his brain is capable of responding to a speaker at several different levels simultaneously. Naturally, this can be an asset to the listener rather than a problem. For example, the listener can attend to nonverbal cues the speaker gives, e.g., facial expression, gesture, or tone of voice, as well as listen to the words themselves.

Besides a highly active brain, an effective listener has another factor to consider in the communicative process. This factor involves the process of trying to perceive what the speaker is saying from his point of view.

The Tendency to Evaluate

According to Carl Rogers, a leading psychotherapist and...researcher, the major barrier to effective communication is the tendency to evaluate...to approve or disapprove the statement or opinion of the other person or group. Suppose someone says to you, "I didn't like what the lecturer had to say." Your typical response will be either agreement or disagreement. In other words, your primary reaction is to evaluate the statement from you own point of view, from you own frame of reference.

Although the inclination to make evaluations is common, it is usually heightened in those situations where feelings and emotions are deeply involved. Thus, the stronger our feelings, the more likely it is that there will be no mutual element in the communication. There will be only two ideas, two feelings, two judgments, missing each other in the heat of the psychological battle.

If having a tendency to evaluate is the major barrier to communication, then the logical gateway to communication is to become an active listener, to listen with understanding. Don't let this simple statement fool you. Listening with understanding means to see the expressed idea and attitude from the other person's point of view, to see how it feels to him, to achieve his frame of reference concerning his subject. One word that summarizes this process of listening with understanding is "empathy."

In psychotherapy, for example, Carl Rogers and his associates have found from research that empathic understanding--understanding *with* a person *not about him**--is such an effective approach that it can bring about major changes in personality....

Toward More Effective Listening

Some steps the listener can take to improve interpersonal communication have been stated. To summarize and be more explicit, let us consider these steps.

1. Effective listening must be an active process. To make certain that you are understanding what the speaker is saying, you, as the listener, must interact with him. One way to do this is to paraphrase or summarize for the speaker what you think he has said.

2. Attending to nonverbal behavior that the speaker is communicating along with his verbal expression usually helps to understand the oral message more clearly. Often a facial expression or gesture will "tell" you that the speaker feels more

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*Editor's italics

strongly about his subject than his words would communicate.

3. The effective listener does not try to memorize every word or fact the speaker communicates, but rather, he listens for the main thought or idea. Since your brain is such a highly effective processor of information, spending your listening time in more than just hearing the words of the speaker can lead to more effective listening. That is, while listening to the words, you can also be searching for the main idea of the message. Furthermore, you can attempt to find the frame of reference for the speaker's message as well as look at what he is saying from his perspective. This empathetic process also includes your attempting to experience the same feeling about the subject as the speaker.

These three steps toward more effective listening seem fairly simple and obvious. But the fact remains that we don't practice these steps very often. Why don't we?

According to Carl Rogers, it takes courage. If you really understand another person in this way, if you are willing to enter his private world and see the way life appears to him without any attempt to make evaluative judgments, you run the risk of being changed yourself. This risk of being changed is one of the most frightening prospects many of us face.

Moreover, when we need to utilize these steps the most, we are likely to use them the least, that is, when the situation involves a considerable amount of emotion. For example, when we listen to a message that contradicts our most deeply held prejudices, opinions, or convictions, our brain becomes stimulated by many factors other than what the speaker is telling us. When we are arguing with someone, especially about something that is "near and dear" to us, what are we typically doing when the other person is making his point? It's certainly not listening empathetically! We're probably planning a rebuttal to what he is saying, or we're formulating a question which will embarrass the speaker. We may, of course, simply be "tuning him out." How often have you been arguing with someone for 30 minutes or so, and you make what you consider to be a major point, and your "opponent" responds by saying, "But that's what I said 30 minutes ago!"

When emotions are strongest, then, it is most difficult to achieve the frame of reference of the other person or group. Yet it is then that empathy is most needed if communication is to be established. A third party, for example, who is able to lay aside his own feelings and evaluation, can assist greatly by listening with understanding to each person or group and clarifying the views and attitudes each holds.

When the parties to a dispute realize that they are being understood, that someone sees how the situation seems to them, the statements grow less exaggerated and less defensive, and it is no longer necessary to maintain the attitude, "I am 100% right and you are 100% wrong."

Summary

Effective communication, at least among human beings, is not a one-way street. It involves an interaction between the speaker and the listener. The responsibility for this interaction is assumed by both parties. You as the speaker can solicit feedback and adjust your message accordingly. As a listener, you can summarize for the speaker what you think he has said and continually practice the empathetic process.

One of the joys of life, at least to me, is to know that I have been heard and understood correctly and to know that someone cares enough to try to understand what I have said. I also get a great deal of satisfaction from seeing this same enjoyment on the face of a speaker when he knows I have understood him (Burke, 1969).

THREE ASPECTS OF PROCESS SKILLS

Within every communication there are two levels: (1) *content*, the topic under discussion, and (2) *process*, feelings about one's self and others during the communication.

> The process level is often more hidden and more subtle than the content level. People generally have great difficulty in communicating feelings [especially] in a group setting...problems...arise between people on the feeling level...and...influence the quality of learning and teaching...(Gorman, 1974).

Gorman concluded that

> ...improvement of teaching is directly related to improvement of communication on both...[the content and the process] levels. Because one level is interrelated with the other, the bypassing or ignoring of the process level creates a more serious impediment to learning than has been realized until recent years.

From the late 50's through the early 70's many books were written and training programs developed that focused on the process aspect of communication and human interaction. As with any novel and exciting concept, this emphasis on process led at times to an overemphasis. "How do you feel about it?" and "What I hear you saying is..." sometimes became overused, hackneyed phrases in the field of human relations.

"What is new...is the focus on process communication *in addition to and combined with* content focus" (Gorman, 1974). In the mid-70's, content and process are equally emphasized as components of effective communication in the teaching process.

In his book *Teachers and Learners: The Interactive Process of Education*, Alfred Gorman (1974) highlights three aspects of process skills in communication:

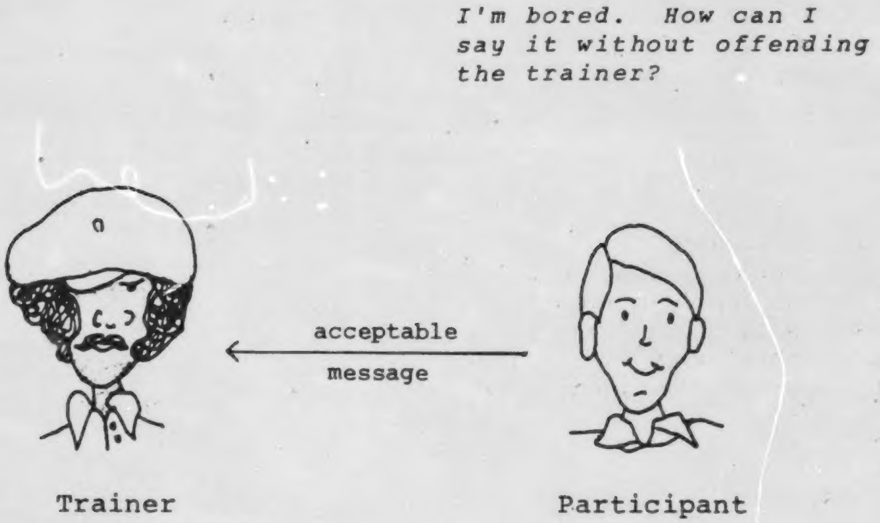
1. The needs of the receiver of feedback
2. The clarity of the message
3. The personal responsibility of the (potential) sender

For example, during a training program, if a participant tells the trainer that he is "bored to death," he is expressing his feelings but not very skillfully. If he had well-developed process skills, he would have taken into account *the needs of the receiver*--in this case the trainer--and *the clarity of the message* plus his own *personal responsibility* for the boring situation. As we know, few people have good process skills. The trainer needs to build the type of learning climate that encourages trainees to develop their verbal communication skills.

Receiver Needs

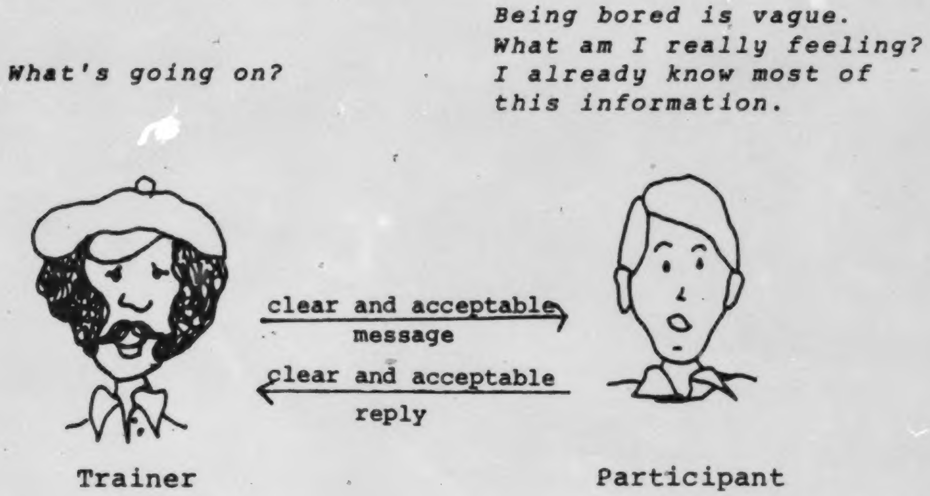
Receivers may need our messages very much. To deal with the problem, in this case, the trainer needs to know that the trainee is bored. The trainee has the alternative of (1) saying nothing verbally *(though the message will still come through nonverbally)*, (2) saying, in a clumsy manner, that he is bored, or (3) communicating his problem to the trainer in a way that the trainer can accept without losing face, in a way that invites them to work together to solve the problem, because the trainer also needs support and respect. Failing to receive these, he may block out the boredom message or he may feel hurt and counterattack the trainee. This causes all sorts of bruised feelings *and does not touch the boredom problem at all.*

What can the trainer do to ensure that the trainee attempts to employ the third alternative? As a potential receiver, he can request that trainees tell him how he is coming across.


I'm bored. How can I say it without offending the trainer?
acceptable
message
Trainer
Participant

Clarity of Message

The need for training in process communication becomes evident whenever people attempt to tell others how they feel. The statement, "I'm bored to death," is a case in point. Even if the receiver of this message could react to it unemotionally, what does boredom really mean? Does it mean that the trainee already knows the content being discussed, has other pressing problems on his mind, feels left out of the group, does not know how to do the work and is frustrated, or does it mean something else? Until the trainer knows more than the bare word *boredom*, he is not in any position to help. If a trainee says, "I'm bored to death," the trainer needs to help the trainee clarify what he means.


What's going on?
Being bored is vague.
What am I really feeling?
I already know most of this information.
clear and acceptable message
clear and acceptable reply
Trainer
Participant

Personal Responsibility

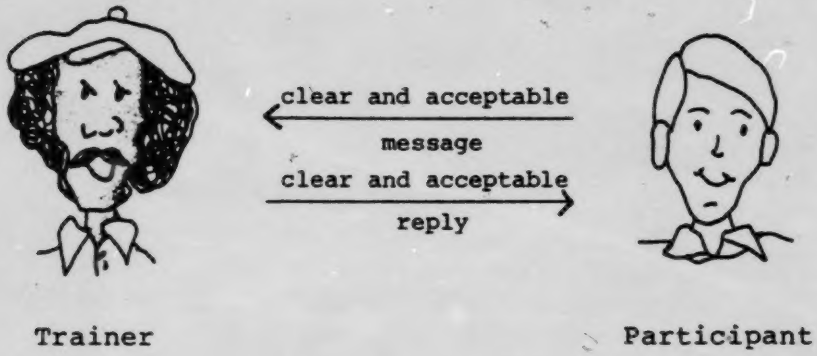
Good trainers do not evade their responsibility for the success of the course--or, more precisely, for the participant's successful learning experience in the course. However, trainers often allow participants to evade their responsibility for making the course a success. Too often trainers fall into the trap of either being experts who tell trainees how to act, or they expect trainees to become responsible for their own learning only after a period of days. The trainee who came to be taught, to receive the "answers," doesn't view learning as a joint responsibility. He doesn't realize that some of this responsibility *is* his. If the trainer makes it clear from the outset that learning is a joint responsibility and demonstrates this approach throughout the course, then both the trainees and the trainer will be free to explore areas for mutual benefit.

We seem to be getting somewhere.

I'm glad he said it that way. It helped me that he told me he knew this information. Now I can use him as a resource.

I'm glad now that I told him what I was feeling. I must have done it with some skill.

Maybe I should do something about my boredom. Why blame it all on him? It might be more interesting if I participated more.



The Process Role of the Trainer

The trainer understands that he is *not* engaging in clinical psychology. Deep-seated emotional problems are not resolvable through the training program. The process role of the trainer is directed at enabling participants to verbalize feelings that are being expressed unclearly and nonverbally. These feelings (on the part of both trainer and trainee) affect what goes on in the session, often in negative ways. The process role of the trainer focuses on exploring and clarifying feelings; on building supportive norms for open, spontaneous behavior; and on developing verbal communication skills. In such sessions, your best friend *will* tell you, and he will tell you in a clear, supportive, helpful way.

FEEDBACK

The *National Training Laboratories (NTL) Reading Book (1969)* describes "feedback" as:

> ...a way of helping another person to consider changing his behavior. It is communication to a person (or group) which gives that person information about how he affects...[you].

Chartier (1976) illustrates the concept of feedback in the following dialogue:

> *Joe:* *Feedback is a process of correcting inaccuracy in communication.*
>
> *Sally:* *Do you mean that feedback is simply a process of correcting errors?*
>
> *Joe:* *Not exactly, although that is a part of what I mean. Feedback is a way of being sure that what I say to you is adequately perceived by you.*
>
> *Sally:* *Now you're really getting complicated. What does "adequately perceived" mean?*
>
> *Joe:* *Well, I think "adequately perceived" means that you understand the idea as I would like for you to understand it.*
>
> *Sally:* *Oh, then you mean that feedback is a device for checking whether or not I got the idea you wanted me to get.*
>
> *Joe:* *Exactly.*
>
> *Sally:* *Do you think I used feedback effectively?...*

Criteria for Useful Feedback

According to the *NTL Reading Book* some criteria for effective feedback are:

1. *IT IS DESCRIPTIVE RATHER THAN EVALUATIVE.* Because you describe your own reaction, the receiver is free to use your feedback or not to use it as he sees fit. By avoiding evaluative language, the receiver's need to react defensively is reduced.

   For example:

   You have interrupted me three times in the last half hour is probably not something that a person really wants to hear, but it is more helpful than, *you are a rude, selfish s.o.b.*

2. *IT IS SPECIFIC RATHER THAN GENERAL.* To be told that one is *"dominating"* is probably not as useful as to be told that *"just now when we were deciding the issue, you continued to*

argue your point of view without responding to what others said, and I felt forced to accept your arguments or face attack from you."

3. *IT TAKES INTO ACCOUNT THE NEEDS OF BOTH THE RECEIVER AND GIVER OF FEEDBACK.* Feedback can be destructive when it serves only the giver's needs and fails to consider the needs of the person on the receiving end.

4. *IT IS DIRECTED TOWARD BEHAVIOR THAT THE RECEIVER CAN DO SOMETHING ABOUT.* When some shortcoming (over which he has no control) is pointed out, the receiver's frustration is often increased.

5. *IT IS SOLICITED, RATHER THAN IMPOSED.* Feedback is most useful when the receiver himself has asked others to tell him how his behavior affected them.

6. *IT IS WELL-TIMED.* In general, feedback is most useful when provided at the earliest opportunity after the given behavior (depending, of course, on the person's readiness to hear it, support available from others, etc.).

7. *IT IS CHECKED TO INSURE CLEAR COMMUNICATION.* By rephrasing the feedback he has received to see if it corresponds to what the sender had in mind, the receiver ascertains that he understands what was said to him.

8. When feedback is given in a training group, both giver and receiver have the *OPPORTUNITY TO CHECK WITH OTHERS IN THE GROUP THE ACCURACY OF THE FEEDBACK.* Is one person's perception shared by others?

Feedback, then is a way of giving help; it is also useful for the individual who wants to learn how well his behavior matches his intensions.

Steps in Giving Feedback

Observing and Reporting

Most of us listen routinely neither seeing nor hearing all the data we need to give useful feedback. Moreover, we are accustomed to making quick, subjective judgments, as we do in conversation. Careful, objective watching and listening--good observation--is the key to the whole feedback process.

As is the case with observation, few people can consistently and accurately report on their feelings or other people's behavior.

The most common reporting error is jumping from an observation to a conclusion (or interpretation) without checking the accuracy of the observation. The first task in giving feedback is to accurately describe observed data.

Leveling

After reporting the data accurately, tell the person how his behavior affected you. Attempt to be open, honest, specific, and descriptive. Try, however, not to overwhelm the person with your feedback. Check often to see if your message is as clear as you think it is.

Pitfalls in Giving Feedback

Making Assumptions (Interpretations)

In the absence of complete data, we make assumptions or inferences to fill in the blanks. (For example, if you are reading this article, I assume you're interested in communication principles though I have no visible data to support this. Likewise, I could infer that you are interested in training.) We make assumptions and inferences daily and, in fact, must do so because there simply isn't enough time or energy for each of us to explain everything, every day.

Assumptions and inferences, however, must be used with discretion. They must be made clear, and checked out. Unless assumptions are clarified and checked, your feedback may be inaccurate, leading you to an inaccurate conclusion.

Confronting

The confronting statement is something to avoid in giving feedback. Feedback should not be given primarily to "dump" or "unload" on another. If you feel you have to say something negative to the other person, then ask yourself who it is you are trying to "help." Feedback should not be given to accuse someone of being responsible for another person's behavior. Feedback should be a direct response from me to you about how your behavior affected me.

Conclusion

Giving effective feedback in part depends on an individual's values and basic philosophy about himself, his relationships with others, and other people's perceptions. Certain guidelines, however, can be learned and are valuable in helping people give and receive useful feedback.

In summary, the object of feedback is the transmission of *reliable* information so that the person receiving it has sufficient information to change his behavior, *if he elects to do so.*

Four questions to ask yourself before giving any feedback are:

1. *Can the receiver's behavior be changed or modified? (If the answer is "no" then don't go on.)*
2. *Are my observations both accurate and objective?*
3. *Can I clearly and accurately describe my observations?*
4. *How can I check with the receiver to insure clear communication?*

For a more in-depth discussion of interpersonal communication, the following topics are covered in other resource papers in your manual:

a. Visualizing the helping situation; things that make it difficult for us to give help; and things that make it difficult for us to receive help: *Feedback and the Helping Relationship.*

b. External vs group-shared feedback; who is responsible for the feedback; pressure to change vs freedom to change; motivation to hurt vs motivation to help; and coping with anger: *Giving Feedback: An Interpersonal Skill.*

c. Characteristics of the feedback process: *Aids for Giving and Receiving Feedback.*

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The Communication Problem

I know you believe you understand
what you think I said,
but I am not sure you realize
that what you heard is not what I meant.

MODULE II: INTERPERSONAL COMMUNICATION AND THE GROUP PROCESS

OVERVIEW

Module II focuses on two elements that facilitate learning: interpersonal communication and the group process.

DISCUSSION: THE PROCESS OF COMMUNICATION

In the space below, note any points brought up during the discussion that are of particular importance to you.

FEEDBACK, A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to provide practice in using the eight feedback rules.

Description

This learning activity is divided into three parts. In the first part, pairs play a game called "I've got it; you want it." In the second part, each member of the pair gives feedback to the other about the game. In the third part, pairs share their experiences with the total group.

Comments

FEEDBACK RATING SCALES*

"Feedback" is a communication to a person (or a group) that gives that person information about how he affects others. Feedback helps an individual consider and alter his behavior and thus better achieve his goals.

Below are eight criteria for useful feedback. Rate the feedback by circling the appropriate number on each of the eight scales. You also may want to note examples of each criterion.

1. Useful feedback is *descriptive* rather than evaluative. It merely describes the sender's reaction, thus leaving the receiver of feedback free to use it or not. By avoiding evaluative language, it reduces the need for the receiver to respond defensively.

Descriptive 1 2 3 4 5 6 Evaluative

Comments:

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*Adapted from meterial in *Reading Book,* 1968 edition, of the NTL Institute for Applied Behavioral Science, associated with the National Education Association.

FEEDBACK RATING SCALES (Continued)

2. It is *specific* rather than general. To be told that one is "dominating" will probably not be as useful as to be told: "Just now when we were deciding the issue, you did not listen to what others said, and I felt forced to accept your arguments or to face attack from you."

Specific 1 2 3 4 5 6 General

Comments:

3. It *takes into account the needs of both the receiver and the giver* of feedback. Feedback can be destructive when it serves only the giver's needs and fails to consider the needs of the receiver.

Takes needs of both into account 1 2 3 4 5 6 Does not take needs of both into account

FEEDBACK RATING SCALES (Continued)

Comments:

4. It is *directed toward behavior the receiver can change.* Frustration is only increased when one is reminded of a shortcoming over which he has no control.

Directed toward modifiable behavior	1	2	3	4	5	6	Directed toward nonmodifiable behavior

Comments:

FEEDBACK RATING SCALES (Continued)

5. It is *solicited* rather than imposed. Feedback is most useful when the receiver himself asks a question that those observing him can answer.

Solicited 1 2 3 4 5 6 Imposed

Comments:

FEEDBACK RATING SCALES (Continued)

6. It is *well timed*. In general, feedback is most useful when given as soon as possible after the observed behavior (depending, of course, on the person's readiness to hear it, on support available from others, etc.).

Well Timed 1 2 3 4 5 6 Poorly Timed

Comments:

7. It is *checked* with the sender. For example, the receiver can rephrase the feedback he has received to insure clear communication.

Checked with sender 1 2 3 4 5 6 Not checked with sender

Comments:

FEEDBACK RATING SCALES (Continued)

8. It is *checked with others* in the group. In a training group, particularly, both giver and receiver can check their feedback: Is it only one person's impression, or is it shared by others?

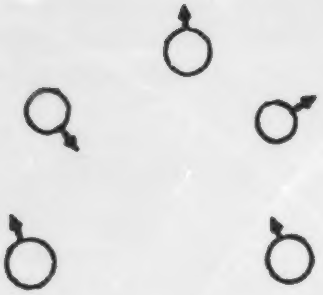
Checked with others	1	2	3	4	5	6	Not checked with others

Comments:

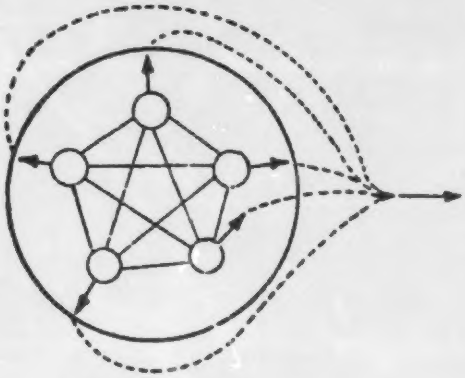
INTRODUCTION TO GROUP PROCESS*

Space for notes is provided below.

I. Differences between a Collection of Individuals and a Group



A Collection of Individuals



A Group

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*Adapted from Malcolm Knowles, *Introduction to Group Dynamics*, (2nd ed.). New York: Association Press, pp. 41 & 42.

II. What Is Group Process?

PROCESS ELEMENTS IN GROUP LIFE (Banet, 1974)

Space for notes is provided below.

I. Process Elements

Process elements are those internal and external influences that affect the group process.

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II. The Group Life Chart*

THE GROUP LIFE CHART:* PROCESS ELEMENTS

GROUP	MEMBER	CONTEXTUAL
INTERACTION PATTERN:** The pattern of interpersonal behavior and communication among members	**BEHAVIOR STYLE:** How the member tends to behave and communicate while in the group	**PHYSICAL AND SOCIAL CONTACTS:** The pattern of behavior and communication outside the group with group members or others
GROUP EMOTION: The predominant mood or feeling in the group; the feeling relations among members	**PERSONAL FEELING STATE:** The needs, drives, urges being experienced	**EMOTIONAL RELATIONS:** The type and quality of the feeling relations between group members and outsiders
GROUP NORMS:** The set of shared ideas about how members, as a group, should feel and behave while in the group	**INTERNALIZED NORMS:** The degree to which a member incorporates the group norms into his own system	**CONTRACTUAL RELATIONS:** Relationships between group members and outsiders (spouses, children, parents, employers, etc.) which have obligations attached
GROUP CULTURE: The collectively defined preferences and standard operating procedures for working in the group	**BELIEFS AND VALUES:** Explicit and implicit definitions of reality; preferences for given ideas, philosophies, world views	**CULTURAL INTERCHANGE:** Feelings about the way group membership is perceived by others; how the group culture can/does interact with the outside world
GROUP LEADERSHIP:** The group's capabilities for developing consciousness; how group leadership is defined and regarded; feelings of members toward the leader and his feelings toward them	**EGO:** The person's capabilities for assessing realities; his strengths, genetic endowment, self-concept; how he feels about himself; his ability to plan and his change potential; intrapsychic events	**FREEDOM-CONTROL RELATIONS:** How members interact with outside authority figures; degree of dependence on the outside world for nurturance, safety, etc.

*Adapted from Mills (1967) by Banet (1974)

**Banet's titles are Interaction System, Normative System and Executive System

A. *Group elements* are the phenomena that occur within the group.

1. The *interaction pattern* is the pattern of interpersonal communication and behavior among members; it is how interaction happens in the group.

2. The *group emotion* is the tone of feeling within the group, the emotional climate.

3. *Group norms* reflect the shared attitudes about how members should feel, think, and behave.

4. The *group culture*, as distinguished from the set of group norms, refers to the degree of formality or informality existing in the group, including group preferences and standard operating procedures.

5. *Group leadership* refers to how leadership is defined, and whether leadership functions are shared within the group, to members' feelings about and perceptions of the leader, and to the leader's feelings about and perceptions of group members. The group's capacity to take responsibility for its own functioning is also part of the group leadership.

B. *Member elements* are process events that are generated by individuals while they are in the group.

1. A member's *behavior style* includes his methods of verbal and nonverbal communication and his tendencies toward self-disclosure or self-protection.

2. The *personal feeling state* includes the needs, drives or urges that a member experiences while in the group.

3. *Internalized norms* refer to the set of group "shoulds" incorporated by the individual member.

4. *Beliefs and values* reflect an individual's convictions about reality.

5. The *ego* refers to an individual's capacity for assessing reality, diagnosing his current situation, and altering his style, habits, feelings, and beliefs according to new circumstances.

c. *Contextual elements* refer to a member's relationships outside of the group.

   1. *Physical and social contacts* refer to interactions with persons (group members or others) outside the group setting.

   2. *Emotional relations* refer to an individual's feelings about emotional relationships with group members or others outside the group.

   3. *Contractual relations* are relationships with obligations attached: with spouse, children, parents, employers, or legal authorities.

   4. *Cultural interchange* refers to the member's position in his culture--whether he feels included, excluded, or alienated--and how he feels his membership in the group is viewed by others outside the group. It also refers to the relationship between the culture of the outside environment, and to an individual's inclusion in an outside group that could influence his or another's behavior within the group.

5. *Freedom-control relations* represent a member's attitudes toward authority and responsibility and the influences these have on his and others' behavior.

D. Perceptions of the Group Process

1. Trainers must be able to identify and focus on those process elements that are most important for achieving the group's purpose. Depending on the type of group, various process elements are of greater or lesser importance.

2. For example, since the purpose of the psychoanalytic therapy group is to help each individual member change his behavior in the "real" world, the group leader would focus on the following elements:*

THE GROUP LIFE CHART:* PROCESS ELEMENTS

GROUP	MEMBER	CONTEXTUAL
INTERACTION PATTERN: The pattern of interpersonal behavior and communication among members	BEHAVIOR STYLE: How the member tends to behave and communicate while in the group	PHYSICAL AND SOCIAL CONTACTS: The pattern of behavior and communication outside the group with group members or others
	PERSONAL FEELING STATE: The needs, drives, urges being experienced	EMOTIONAL RELATIONS: The type and quality of the feeling relations between group members and outsiders
	INTERNALIZED NORMS: The degree to which a member incorporates the group norms into his own system	CONTRACTUAL RELATIONS: Relationships between group members and outsiders (spouses, children, parents, employers, etc.) which have obligations attached
	BELIEFS AND VALUES: Explicit and implicit definitions of reality; preferences for given ideas, philosophies, world views	CULTURAL INTERCHANGE: Feelings about the way group membership is perceived by others; how the group culture can/does interact with the outside world
	EGO: The person's capabilities for assessing realities; his strengths, genetic endowment, self-concept; how he feels about himself; his ability to plan and his change potential; intrapsychic events	FREEDOM-CONTROL RELATIONS: How members interact with outside authority figures; degree of dependence on the outside world for nurturance, safety, etc.

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*Adapted from Banet, 1974.

3. Another example involves the Assessment Interviewing for Treatment Planning (AITP) course. The purpose of AITP is to train counselors in the use of a focused, well-organized interview to gather information needed to develop a client's treatment plan.

The trainer would focus on:

GROUP	MEMBER	CONTEXTUAL
INTERACTION PATTERN: The pattern of interpersonal behavior and communication among members	**BEHAVIOR STYLE:** How the member tends to behave and communicate while in the group	
	INTERNALIZED NORMS: The degree to which a member incorporates the group norms into his own system	**CONTRACTUAL RELATIONS:** Relationships between group members and outsiders (spouses, children, parents, employers, etc.) which have obligations attached
	EGO: The person's capabilities for assessing realities; his strengths, genetic endowment, self-concept; how he feels about himself; his ability to plan and his change potential; intrapsychic events	

LEARNING ACTIVITY SHEET

INSTRUCTIONS

You have been asked to conduct a five-day counselor training course for nonprofessional counselors who have been working in drug treatment. The group averages one year of counseling experience; none of the members have had any formal education or training in counseling techniques. The purpose of the training is to increase participants'--

- skills in the areas of empathy, values and attitudes, exploration, and problem solving so that they can apply those skills to establishing and maintaining more effective helping relationships with their clients;
- appreciation for the responsibility and influence of the counselor in the helping relationship (including the limitations of the counselor);
- understanding of the dynamics of the helping relationship;
- appreciation of the need for self-awareness on the part of the counselor;
- understanding of the client's affective, cognitive, and behavioral processes;
- appreciation for the necessity to respond to the client as a whole person, with drug abuse or drug-related problems being symptomatic or incidental to other concerns.

Given this purpose, which process elements of the Group Life Chart would you focus on?

LEARNING ACTIVITY SHEET (Continued)

THE GROUP LIFE CHART:* PROCESS ELEMENTS

GROUP	MEMBER	CONTEXTUAL
INTERACTION PATTERN:** The pattern of interpersonal behavior and communication among members	**BEHAVIOR STYLE:** How the member tends to behave and communicate while in the group	**PHYSICAL AND SOCIAL CONTACTS:** The pattern of behavior and communication outside the group with group members or others
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"PROCESS ELEMENTS IN GROUP LIFE," A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to give small groups practice in applying the concept of the process elements in group life to a hypothetical training situation.

Description

Using your completed learning activity sheets for reference, as a small group decide which process elements are the most important to focus on when conducting a counselor training course. The groups will then review the process that occurred while decisions were being made. After this, experiences will be shared in the large group.

Comments

OBSERVER GUIDE*

Below are some guidelines to help an observer analyze group process.

PARTICIPATION

One indication of involvement is verbal participation. Look for differences in the amount of participation among members.

- *Who participates more than others?*
- *Who participates less?*
- *Do you see any shift in participation, e.g., those who speak often become quiet; those who were silent suddenly become talkative? Do you see any possible reason for this in the group's interaction?*
- *How are the silent ones treated? How is their silence interpreted--as consent, disagreement, disinterest, fear?*
- *Who talks to whom? Do you see any reason for this in the group's interactions?*
- *Who keeps the ball rolling? Why? Do you see any reason for this in the group's interactions?*

DECISION-MAKING PROCEDURES

Many kinds of decisions are made in groups without considering the effects of these decisions on other members. Some people try to impose their own decisions on the group, while others want all members to participate or share in the decisions that are made.

- *Does anyone make a decision and carry it out independently of other group members? For example, does he decide on the topic to be discussed and immediately begin to talk about it? What effect does this have on other group members?*
- *Does the group drift from topic to topic? Who topic-jumps? Do you see any reason for this in the group's interactions?*
- *Who supports other members' suggestions or decisions? Does this support result in a decision by two members about the topic or activity for the total group? How does this affect other group members?*

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* Selected from "What to Look for in Groups," p. II-87.

OBSERVER GUIDE (Continued)

- *Is there any evidence of a decision imposed by a majority over other members' objections? Do they call for a vote?*
- *Is there any attempt to reach a consensus? What effect does this seem to have on the group?*
- *Does anyone make contributions that do not receive any kind of response or recognition? What effect does this have on the member? On the group?*

TASK FUNCTIONS

These functions illustrate behaviors that are concerned with getting the job done, or accomplishing the task that the group has before it.

- *Does anyone ask for or make suggestions as to the best way to proceed or to tackle a problem?*
- *Who keeps the discussion focused on one topic at a time?*
- *Does anyone give or ask for facts, ideas, opinions, or feelings, or does anyone search for alternatives?*
- *Does anyone attempt to summarize what has been covered or what has been going on in the group?*

MAINTENANCE FUNCTIONS

These functions are important to the morale of the group. They are important in maintaining harmonious working relationships among the members and create a good atmosphere in which each member can contribute maximally. They insure smooth and effective teamwork within the group.

- *Who helps others get into the discussion?*
- *Who interrupts others?*
- *How well do members get their ideas across? Are some members preoccupied and not listening? Are there any attempts by group members to help others clarify their ideas?*
- *How are ideas rejected? How do members react when their ideas are not accepted? Do those rejecting the ideas support the person?*

ROLE FUNCTIONS IN GROUPS

The discussion of role functions is based on the following resource paper. Space for notes is provided at the end of the paper.

ROLE FUNCTIONS IN A GROUP*

The members of an efficient and productive group must provide for meeting two kinds of needs--what it takes to do the job, and what it takes to strengthen and maintain the group. Specific statements and behaviors may be viewed at a more abstract level than the content or behavior alone, i.e., in terms of how they serve the group needs.

What members do to serve group needs may be called functional roles. Statements and behaviors which tend to make the group inefficient or weak may be called nonfunctional behaviors.

A partial list of the kinds of contributions or the group services which are performed by one or many individuals is as follows:

A. TASK ROLES (functions required in selecting and carrying out a group task)

1. *Initiating Activity:* proposing solutions, suggesting new ideas, new definitions of the problem, new approaches to the problem, or new ways of organizing material
2. *Seeking Opinion:* looking for an expression of feeling about something from the members, seeking clarification of values, suggestions, or ideas
3. *Seeking Information:* asking for clarification of suggestions, requesting additional information or facts
4. *Giving Information:* offering facts or generalizations, relating one's own experience to the group problem to illustrate points

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*Reproduced by special permission from *Handbook of Staff Development and Human Relations Training: Materials Developed for Use in Africa*, of the NTL Institute for Applied Behavioral Science, associated with The National Education Association, 1967. The classification system was developed by Morton Deutsch, "The Effects of Cooperation & Competition upon Group Process." In D. Cartwright & A. Zander, *Group Dynamics--Research & Theory*, (2nd ed.). Evanston, Illinois: Row Peterson & Co., 1960. See also Benne, K.D., & Sheats, P. "Functional Roles & Group Members." *Journal of Social Issues*, 1948, 4(2).

5. *Giving Opinion:* stating an opinion or belief concerning a suggestion or one of several suggestions, particularly concerning its value rather than its factual basis

6. *Elaborating:* clarifying, giving examples or developing meanings, trying to envision how a proposal might work if adopted

7. *Coordinating:* showing relationships among various ideas or suggestions, trying to pull ideas and suggestions together, trying to draw together activities of various subgroups or members

8. *Summarizing:* pulling together related ideas or suggestions, restating suggestions after the group has discussed them

B. GROUP BUILDING AND MAINTENANCE ROLES (functions required in strengthening and maintaining group life and activities)

1. *Encouraging:* being friendly, warm, responsive to others, praising others and their ideas, agreeing with and accepting contributions of others

2. *Gatekeeping:* trying to make it possible for another member to make a contribution to the group by saying, "We haven't heard anything from Jim yet," or suggesting limited talking time for everyone so that all will have a chance to be heard

3. *Standard Setting:* expressing standards for the group to use in choosing its content or procedures or in evaluating its decisions, reminding group to avoid decisions which conflict with group standards

4. *Following:* going along with decisions of the group, thoughtfully accepting ideas of others, serving as audience during group discussion

5. *Expressing Group Feeling:* summarizing what group feeling is sensed to be, describing reactions of the group to ideas or solutions

C. BOTH GROUP TASK AND MAINTENANCE ROLES

1. *Evaluating:* submitting group decisions or accomplishments to comparison with group standards, measuring accomplishments against goals

2. *Diagnosing:* determining sources of difficulties, appropriate steps to take next, analyzing the main blocks to progress

3. *Testing for Consensus:* tentatively asking for group opinions in order to find out whether the group is nearing consensus on a decision, sending up trial balloons to test group opinions

4. *Mediating:* harmonizing, conciliating differences in points of view, making compromise solutions

5. *Relieving Tension:* draining off negative feeling by jesting or pouring oil on troubled waters, putting a tense situation in wider context

From time to time,more often perhaps than anyone likes to admit, people behave in nonfunctional ways that do not help and sometimes actually harm the group and the work it is trying to do. Some of the more common types of such nonfunctional behaviors are described below.

D. TYPES OF NONFUNCTIONAL BEHAVIOR

1. *Being Aggressive:* working for status by criticizing or blaming others, showing hostility towards the group or an individual, deflating the ego or status of others

Blocking: interfering with the group's progress by intentionally deviating from the subject of discussion, citing irrelevant personal experiences, rejecting ideas without consideration, arguing excessively

Self-Confessing: using the group as a sounding board, expressing personal, nongroup-oriented feelings or points of view

Competing: vying with others to produce the best idea, to talk the most, to play the most roles, to gain the leader's favor

5. *Seeking Sympathy:* trying to gain group members' sympathy to one's problems or misfortunes, deploring one's own situation, or disparaging one's own ideas to gain support

6. *Special Pleading:* introducing or supporting suggestions related to personal concerns or philosophies, lobbying

7. *Horsing Around:* clowning, joking, mimicking, disrupting the work of the group

8. *Seeking Recognition:* attempting to call attention to one's self by loud or excessive talking, extreme ideas, unusual behavior

9. *Withdrawal:* acting indifferently or passively, resorting to excessive formality, daydreaming, doodling, whispering to others, wandering from the subject

In using a classification such as the one above, people need to guard against the tendency to blame any person (whether themselves or another) who falls into "nonfunctional behavior." It is more useful to regard such behavior as a symptom that all is not well with the group's ability to satisfy individual needs through group-centered activity. People need to be alert to the fact that each person is likely to interpret such behavior differently. For example, what appears to be nonfunctional behavior may not necessarily be so, for the content and the group conditions must also be taken into account. There are times when some forms of aggression contribute positively by clearing the air and instilling energy into the group.

E. IMPROVING MEMBER ROLES

Any group is strengthened and enabled to work more efficiently if its members--

1. become more conscious of the role function needed at any given time;

2. become more sensitive to and aware of the degree to which they can help to meet the needs through what they do;

3. undertake self-training to improve their range of role functions and skills in performing them.

SUMMARY OF MODULE II AND OVERVIEW OF MODULE III

Reading Assignment

The resource paper, "Theories of Group Development," will be discussed at the beginning of Module III.

REFERENCES

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Use the space below for any additional notes.

FEEDBACK: THE ART OF GIVING AND RECEIVING HELP

by

Cyril R. Mill

Reproduced by special permission from *Reading Book*, 1972 Edition of The NTL Institute for Applied Behavioral Science, associated with The National Education Association, edited by Cyril R. Mill and Lawrence C. Porter.

FEEDBACK: THE ART OF GIVING AND RECEIVING HELP

Feedback is a way of helping another person to consider changing his behavior. It is communication to a person which gives him information about some aspect of his behavior and its effect on you. As in a guided missile system, feedback helps an individual know whether his behavior is having the effect that he wants; it tells him whether he is "on target" as he strives to achieve his goals.

CRITERIA FOR USEFUL FEEDBACK

The giving and receiving of feedback is a skill that can be acquired. When feedback is attempted at the wrong time or given in the wrong way the results will be at best useless, and may be disastrous. Therefore, developing feedback skills can be important. Here are some criteria for useful feedback:

- It is descriptive rather than evaluative. It is helpful to focus on what the individual did rather than to translate his behavior into a statement about what he is. *"You have interrupted three people in the last half hour"* is probably not something that a person really wants to hear, but it is likely to be more helpful than, *"You are a bad-mannered oaf."*

- It focuses on the feelings generated in the person who has experienced the behavior and who is offering the feedback. *"When you interrupt me I feel frustrated,"* gives the individual clear information about the effect of his behavior, while at the same time leaving him free to decide what he wants to do about that effect.

- It is specific rather than general. For example, it is probably more useful to learn that you *"talk too much"* than to have someone describe you as *"dominating."*

- It is directed toward behavior which the receiver can do something about. Frustration is increased when a person is reminded of some shortcoming over which he has no control.

- It is solicited rather than imposed. Feedback is most useful when the receiver feels that he needs and wants it, when he himself has formulated the kind of question which those observing him can answer.
- It is well-timed. In general, feedback is most useful at the earliest opportunity after the given behavior, depending, of course, on the receiver's readiness to hear it, support available from others, and so on.
- It is checked to ensure clear communication. One way of doing this is to have the receiver try to rephrase the feedback in question to see whether the receiver's version corresponds with what the sender meant.
- When feedback is given in a training group, both giver and receiver have opportunity to check its accuracy with others in the group. Thus the receiver will know whether this is one person's impression or an impression shared by others.
- Feedback should not be given primarily to "dump" or "unload" on another. If you feel you have to say this to the other person, then ask yourself who it is you are trying to "help."
- Feedback does not ask "Why?" It stays within the bounds of behavior and one's reactions to that behavior. To theorize about or ask why a person does a certain thing is to plumb the depths of motivation and, perhaps, of the unconscious. Avoiding the "whys" will help one to avoid the error of amateur psychologizing.

Given the premise that properly given feedback can be a fine way to learn about oneself, what are some reasons that we resist it? For one thing, it is hard to admit our difficulties to ourselves. It is even harder to admit them to someone else. We are not sure that the other person can be trusted or that his observations are valid. We may be afraid of learning what others think of us; we often expect to hear only negative opinions about ourselves, tending to overlook our positive qualities.

We may have struggled so hard to make ourselves independent that the thought of depending on another individual seems to violate something within us. Or we may during all our lives have looked for someone on whom to depend, and we try to repeat this pattern in our relationship with the helping person.

We may be looking for sympathy and support rather than for help in seeing our difficulty more clearly. When the helper tries to point out some of the ways we are contributing to the problem, which might suggest that we as well as others will have to change, we may stop listening. Solving a problem may mean uncovering some of the sides of ourselves which we have avoided or wished to avoid thinking about.

We may feel our problem is so unique no one could ever understand it and certainly not an outsider.

On the other side of the interchange, it is not always easy to give feedback to others. Most of us like to give advice. Doing so suggests that we are competent and important. We get caught up in a "telling" role easily enough without testing whether our advice is appropriate to the total issue or to the abilities, the fears, or the powers of the person we are trying to help.

If the person whom we are trying to help becomes defensive, we may try to argue or pressure him. Defensiveness or denial on the part of the receiver is a clear indication that we are going about trying to be helpful in the wrong way. Our timing is off or we may be simply mistaken about his behavior, but in any case, it is best to desist until we can reevaluate the situation. If we respond to the receiver's resistance with more pressure, resistance will only increase.

Feedback takes into account the needs of both the receiver and the giver. Positive feedback is welcomed by the receiver when it is genuine. If feedback is given in a training laboratory under the conditions described here, it can become one of the primary means of learning about self.

INTERACTION IN THE HELPING RELATIONSHIP

This article was originally entitled Feedback and the Helping Relationship and has been adapted by special permission from *Reading Book,* 1969 Editior of the NTL Institute for Applied Behavioral Sciences, associated with the National Education Association.

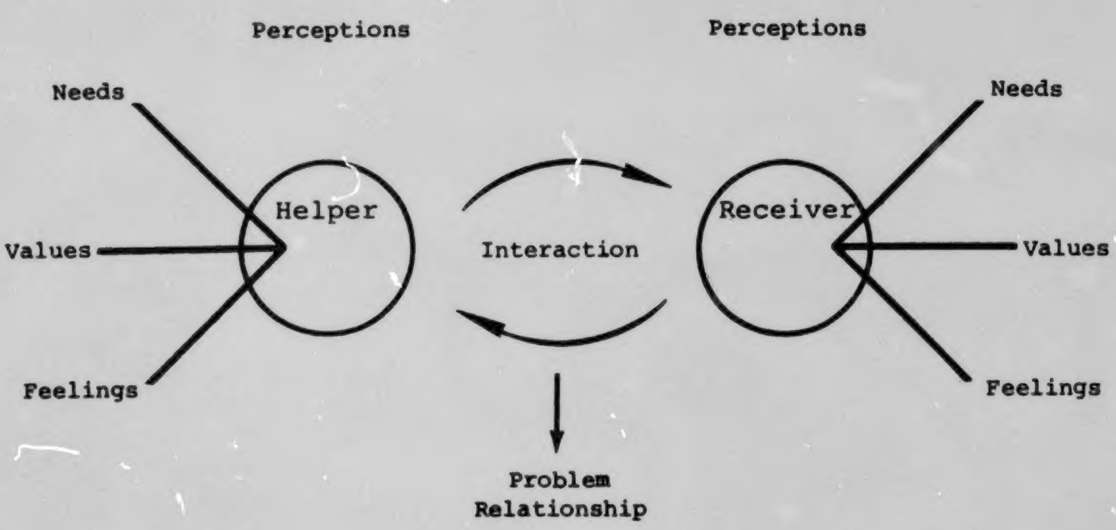
FEEDBACK AND THE HELPING RELATIONSHIP

GENERAL OBSERVATIONS

Different names are used to designate the helping process, for example, counseling, teaching, guiding, training, educating, etc. These have in common the intent to influence (and therefore change) the individual who is being helped. The expectation is that the change in the receiver will be constructive and useful to him (i.e., will clarify his perceptions of the problem, bolster his self-confidence, modify his behavior (or help him develop new skills, etc.).

THE HELPING SITUATION

One way to look at the helping situation is to sketch it in the following manner.


Perceptions
Perceptions
Needs
Needs
Helper
Receiver
Values
Interaction
Values
Feelings
Feelings
Problem Relationship

- The helping situation is dynamic, i.e., characterized by interaction that is both verbal and nonverbal.
- The helping person has needs (biological and psychological), feelings, and a set of values.
- The receiver of help has needs (biological and psychological), feelings, and a set of values.

- Both helper and the receiver of help are trying to satisfy certain of these needs.

- The helper has perceptions of himself, of the receiver of help, of the problem, and of the entire situation (expectancies, roles, standards, etc.)

- The receiver of help has perceptions of himself, of the helper, of the problem, and of the entire situation (expectancies, roles, standards, etc.).

- The interaction takes place in relation to some need or problem that may be external to the two individuals, interwoven with the relationship of the two individuals, or rooted in the relationship between the two individuals. Wherever the beginning point and the focus of emphasis is, the relationship between the two individuals becomes an important element in the helping situation as soon as interaction begins.

- His needs, values, and feelings, his perception of these, and his perception of the situation cause the receiver of help to have certain objectives.

- His needs, values, and feelings, his perception of these, and his perception of the situation cause the helper to have certain objectives.

- Both helper and receiver of help have power (influence) in the helping situation. However, it is the receiver of help who controls whether or not change actually takes place.

To depict the helping situation as above suggests its complexity. It is not easy to help another so that he will better his situation. Nor is it easy to receive help from another person, not the kind of help that allows us to deal with our problems more adequately. If we really consider the helping situation, we will be impressed with the magnitude and range of the problems involved and will also realize that we are always learning to give or receive help.

THINGS THAT MAKE IT DIFFICULT TO GIVE OR RECEIVE HELP

Let us consider some of the things that make it difficult for us to give help.

- Most of us like to give advice. Doing so suggests to us that we are important. We easily get caught in a telling role without testing whether our advice is appropriate to the abilities, the fears, or the powers of the person we are trying to help.

- If the person we are trying to help becomes defensive, we may try to argue or pressure him.
- We may confuse the relationship by only responding to one aspect of the other's problem. We may avoid recognition that the person counseled must see his own role as well as his own limitations.

Let us consider some of the things about us that make it difficult to receive help.

- It is hard to admit our difficulties even to ourselves. It may be even harder to admit them to someone else. We sometimes doubt that we can really trust the other person, particularly if the relationship is in a work or other situation and our standing could be affected. We may also be afraid of what the other person thinks of us.
- We may have struggled so hard to make ourselves independent that the thought of depending on another seems to violate something within us. Or we may have always looked for someone on whom to be dependent and we try to repeat this pattern in our relationship with the helping person.
- We may be looking for sympathy and support rather than for help in seeing our difficulty more clearly. When the helper tries to point out some of the ways we are contributing to the problem, we may stop listening. Solving a problem may mean uncovering some of the sides of ourselves that we have avoided or wished to avoid thinking about.
- We may feel our problem is so unique no one could ever understand it, certainly not an outsider.

To be fruitful, the helping situation needs these characteristics:

- Mutual trust
- Recognition that the helping situation is a joint exploration
- Listening, with the helper listening more than the individual receiving help
- Behavior by the helper that is calculated to make it easier for the individual receiving help to talk

AIDS FOR GIVING AND RECEIVING FEEDBACK

by

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AIDS FOR GIVING AND RECEIVING FEEDBACK

Some of the most important data we can receive from others (or give to others) consists of feedback related to our behavior. Such feedback can provide learning opportunities for each of us if we can use the reactions of others as a mirror for observing the consequences of our behavior. Such personal data feedback helps to make us more aware of *what* we do and *how* we do it, thus increasing our ability to modify and change our behavior and to become more effective in our interactions with others.

To help us develop and use the techniques of feedback for personal growth, it is necessary to understand certain characteristics of the process. The following is a brief outline of some factors which may assist us in making better use of feedback, both as the giver and the receiver of feedback. This list is only a starting point. You may wish to add further items to it.

1. *Focus feedback on behavior rather than the person*

It is important that we refer to what a person *does* rather than comment on what we imagine he *is*. This focus on behavior further implies that we use adverbs (which relate to actions) rather than adjectives (which relate to qualities) when referring to a person. Thus we might say a person "talked considerably in this meeting," rather than that this person "is a loudmouth." When we talk in terms of "personality traits" it implies inherited constant qualities difficult, if not impossible, to change. Focusing on *behavior* implies that it is something related to a specific situation that might be changed. It is less threatening to a person to hear comments on his behavior than his "traits."

2. *Focus feedback on observations rather than inferences*

Observations refer to what we can see or hear in the behavior of another person, while inferences refer to *interpretations* and conclusions which *we make* from what we see or hear. In a sense, inferences or *conclusions* about a person contaminate our observations, thus clouding the feedback for another person. When inferences or conclusions are shared and it may be valuable to have this data, it is important that they be so identified.

3. *Focus feedback on description rather than judgment*

The effort to describe represents a process for reporting what occurred, while judgment refers to an evaluation in terms of good or bad, right or wrong, nice or not nice. The judgments arise out of a personal frame of reference or values, whereas description represents *neutral* (as far as possible) reporting.

4. *Focus feedback on descriptions of behavior which are in terms of "more or less" rather than in terms of "either-or"*

The "more or less" terminology implies a continuum on which any behavior may fall, stressing quantity, which is objective and measurable, rather than quality, which is subjective and judgmental. Thus, participation of a person may *fall* on a continuum from low participation to *high* participation, rather than "good" or "bad" participation. Not to think in terms of "more or less" and the use of continua is to trap outselves into thinking in categories, which may then represent serious distortions of reality.

5. *Focus feedback on behavior related to a specific situation, preferably to the "here and now" rather than to behavior in the abstract, placing it in the "there and then"*

What you and I do is always tied in some way to time and place, and we increase our understanding of behavior by keeping it tied to time and place. Feedback is generally more meaningful if given as soon as appropriate after the observation or reactions occur, thus keeping it concrete and relatively free of distortions that come with the lapse of time.

6. *Focus feedback on the sharing of ideas and information rather than on giving advice*

By sharing ideas and information we leave the person free to decide for himself, in the light of his own goals in a particular situation at a partiular time, how to *use* the ideas and the information. When we give advice we tell him what to do with the information, and in that sense we take away his freedom to determine for himself what is *for him* the most appropriate course of action.

7. *Focus feedback on exploration of alternatives rather than answers or solutions*

The more we can focus on a variety of procedures and means for the attainment of a particular goal, the less likely we are to accept prematurely a particular answer or solution--which may or may not fit our particular problem. Many of us go around with a number of answers and solutions for which there are no problems.

8. *Focus feedback on the value it may have to the recipient, not on the value or "release" that it provides the person giving the feedback*

The feedback provided should serve the needs of the recipient rather than the needs of the giver. Help and feedback need to be given and heard as an offer, not an imposition.

9. *Focus feedback on the amount of information that the person receiving it can use, rather than on the amount that you have which you might like to give*

To overload a person with feedback is to reduce the possibility that he may use what he receives effectively. When we give more than can be used we may be satisfying some need for ourselves rather than helping the other person.

10. *Focus feedback on time and place so that personal data can be shared at appropriate times*

Because the reception and use of personal feedback involves many possible emotional reactions, it is important to be sensitive to when it is appropriate to provide feedback. Excellent feedback presented at an inappropriate time may do more harm than good.

11. *Focus feedback on what is said rather than why it is said*

The aspects of feedback which relate to the *what, how, when, where*, of what is said are observable characteristics. The *why* of what is said takes us from the observable to the inferred, and brings up questions of "motive" or "intent."

It may be helpful to think of "why" in terms of a specifiable goal or goals--which can then be considered in terms of time, place, procedures, probabilities of attainment, etc. To make assumptions about the motives of the person giving feedback may prevent us from hearing or cause us to distort what is said. In short, if I question "why" a person gives me feedback, I may not hear *what* he says.

In short, the giving (and receiving) of feedback requires courage, skill, understanding, and respect for self and others.

GIVING FEEDBACK: AN INTERPERSONAL SKILL

by

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GIVING FEEDBACK: AN INTERPERSONAL SKILL

The process of giving and asking for feedback is probably the most important dimension of laboratory education. It is through feedback that we can learn to "see ourselves as others see us." This, of course, is not an easy task. Effectively giving and receiving feedback implies certain key ingredients: caring trusting, acceptance, openness, and a concern for the needs of others. Thus, how evaluative, judgmental, or helpful feedback is may finally depend on the personal philosophy of the individuals involved. Nevertheless, giving feedback is a *skill* that can be learned and developed and for which certain useful guidelines exist.

The term "feedback" was borrowed from rocket engineering by Kurt Lewin, a founder of laboratory education. A rocket sent into space contains a mechanism that sends signals back to Earth. On Earth, a steering apparatus receives these signals, makes adjustments if the rocket is off target, and corrects its course. The group can be seen as such a steering mechanism, sending signals when group members are off target in terms of the goals they have set for themselves. These signals--feedback--can then be used by an individual to correct his course. For example, a person's goal may be to become more aware of himself and to learn how his behavior affects others. Information from the group can help him to ascertain whether he is moving toward this goal. If he reacts to criticisms of his behavior by getting angry, leaving the room, or otherwise acting defensively, he will not reach his goal. Group members may help him by saying, "George, every time we give you feedback, you do something that keeps us from giving you further information. If you continue this kind of behavior, you will not reach your goal." If George responds to the "steering" of the group by adjusting his direction, he can again move toward his target. Feedback, then, is a technique that helps members of a group achieve their goals. It is also a means of comparing one's own perceptions of his behavior with others' perceptions.

Giving feedback is a verbal or nonverbal process through which an individual lets others know his perceptions and feelings about *their* behavior. When *soliciting* feedback, an individual is asking for others' perceptions and feelings about *his* behavior. Most people give and receive feedback daily without being aware of doing so. One purpose of laboratory training is to increase the awareness of this process so that it can be engaged in intentionally rather than unconsciously.

INFORMATION-EXCHANGE PROCESS

Between two people, the process of exchange goes something like this: Person A's *intention* is to act in relation to person B, who sees only person A's *behavior*. Between his intention and his behavior comes an encoding process that person A uses to make his behavior congruent with his intentions. Person B perceives person A's behavior, intepretes it (a decoding process), and intends to respond. Between person B's intention and his responding behavior an encoding process also occurs. Person A then perceives person B's responding behavior and intepretes it. However, if either person's process is ineffective, the receiver may respond in a manner that will confuse the sender. Although the feedback process can help an individual discover whether his behavior is congruent with his intentions, the process focuses on *behavior* rather than on *intentions*. An individual's intentions are private; unless he explains them, other people can only conjecture what those intentions are. One of the most confusing aspects of communication is that people tend to give feedback about other people's *intentions*, rather than their *behavior*. Causing further confusion is the fact that many people perceive behavior as being negatively intended, when in fact it is not. It is often difficult to see that the sender's intentions may not be what they are perceived to be.

RESPONSIBILITY FOR FEEDBACK

In many feedback exchanges, the question of ownership frequently arises: How much responsibility should the giver assume for his behavior and the receiver for his response? If person A behaves so that he evokes a negative response (feedback) from person B, how much ownership should each assume for his part of the interaction? Some people are willing to assume more than their share of the responsibility for another person's responses, while others refuse to own any responsibility for their behavior.

For example, an individual may be habitually late for group meetings and may receive feedback concerning members' negative reactions to this behavior. His response is to point out to the group members their lack of tolerance for individual differences. He says that they are limiting his freedom and that they seem to be investing too much responsibility in him for the group's effectiveness. He states that he wants to be involved in the group, but he does not understand why they need to be on time.

This situation presents a value dilemma to the group; his observations are accurate, but his behavior is provocative. One clarification of this dilemma is to point out that, while an individual owns only his behavior, the reactions of others inevitably affect him. To the extent that he cares about the others or his relationship with them, he must consider their responses.

Concern for the needs of others as well as one's own is a critical dimension in the exchange of feedback. Ownership or responsibility for one's behavior and the consequences of that behavior overlap between the giver and receiver of feedback. The problem lies in reaching some mutual agreement concerning where one person's responsibility ends and the other's begins.

GUIDELINES FOR USING FEEDBACK

It is possible to minimize a person's defensiveness in receiving feedback and to maximize his ability to use it for his personal growth. Regardless of how accurate feedback may be, if a person cannot accept the information because he is defensive, then feedback is useless. Feedback must be given so that the person receiving it can *hear* it in the most objective and least distorted way possible, *understand* it, and choose to *use* it or *not use* it.

The following guidelines are listed as if they were bipolar, with the second term in each dimension describing the more effective method of giving feedback. For example, in one group George, intending to compliment Marie, says to her, "I wish I could be more selfish, like you." Marie might respond, "Why, you insensitive boor, what do you mean by saying I'm selfish?" George might then get defensive and retaliate, and both people would become involved in the game of "who-can-hurt-whom-the-most." Instead, Marie might give George feedback by stating her position in another way. That is, she could say, "When you said, 'I wish I could be more selfish, like you,' I felt angry and degraded." This second method of giving feedback contains positive elements that the first does not.

Indirect vs Direct Expression of Feelings

When Marie stated that George was an insensitive boor, she was expressing her feelings indirectly. That statement might imply that she was feeling angry or irritated, but one could not be certain. On the other hand, Marie expressed her feelings directly when she said, "I felt angry and degraded." She committed herself, and there was no need to guess her feelings. If Tom says to Andy, "I like you," he is expressing his feelings directly, risking rejection. However, if he says, "You are a likeable person," the risk is less. Indirect expression of feelings is safer because it is ambiguous. Andy might guess that Tom likes him, but Tom can always deny it. If Andy rejects Tom by saying, "I am happy to hear that I am likeable, but I do not like you," Tom can counter, "You are a likeable person, but *I* do not like you." Indirect expression of feelings offers an escape from commitment.

"You are driving too fast" is an indirect expression of feelings. "I am anxious because you are driving too fast" is a direct expression of feelings. Indirect statements often begin with "I feel that ..." and finish with a perception or opinion, for example, "I feel that you are angry." This is an indirect expression or perception and does not state what "I" is feeling. Instead, "I am anxious because you look angry" expresses the speaker's feelings directly and also states a perception. People frequently assume that they are expressing their feelings directly when they state opinions and perceptions starting with "I feel that ...," but they are not.

Interpretation vs Description of Behavior

In the original example in which Marie said to George, "When you said, 'I wish I could be more selfish, like you,' I felt angry and degraded," Marie was describing the behavior to which she was reacting. She was not attributing a motive to George's behavior, such as "You are hostile," or "You do not like me." When one attributes a motive to a person's behavior one is interpreting that person's *intention*. Since his intention is private and available only to him, interpretation of his behavior is highly questionable. In addition, one person's interpretations probably arise from a theory of personality that may not be shared by the other person. For example, if William is fidgeting in his chair and shuffling his feet, and Walter says, "You are anxious," Walter is interpreting William's behavior. Walter's theory of personality states that when a person fidgets in his chair and shuffles his feet, he is manifesting anxiety. Such a theory interposed between two people may create a distance between them or act as a barrier to understanding. If, instead, Walter *describes* William's behavior, William may interpret his own behavior by saying, "I need to go to the bathroom."

In any event, interpreting another person's behavior or ascribing motives to it tends to put that person on the defensive and makes him spend his energies on either explaining his behavior or defending himself. It deprives him of the opportunity to interpret or make sense of his own behavior and, at the same time, makes him dependent on the interpreter. The feedback, regardless of how much insight it contains, cannot be used.

Evaluative vs Nonevaluative Feedback

Effective feedback to George was not accomplished by calling him names such as "insensitive boor" or, in other words, evaluating him as a person. When giving feedback, one must respond not to the personal worth of the person but to his *behavior*. When someone is told that he is "stupid" or "insensitive," it is extremely difficult for him to respond objectively. He may sometimes *act* stupidly or *behave* in an insensitive way, but that does not mean that he is a stupid or insensitive person. Evaluating a person casts one in the role of a judge and places that person in the role of being judged. In addition, a frame of reference or set of values is imposed that may not be applicable to, or shared by, other people. That is, the person making the evaluation assumes that he can distinguish between a "good" person and a "bad" person or between "right" and "wrong," and that if the receiver of the feedback does not exemplify these values, the sender will be unhappy with him.

Response to Evaluative Feedback

It is difficult for anyone to respond to evaluative feedback because it usually offends his feelings of worth and self-esteem. These are core concepts about ourselves that cannot be changed readily by feedback, nor can they be easily interpreted in terms of actual behavior. It is difficult, for example, to point out to an individual the specific behaviors that manifest low self-esteem. If a person is given feedback that he is "stupid," he may not know what *behaviors* to change. It is the person's observable behavior and not his self-esteem that must be responded to when giving feedback.

An additional problem with evaluative feedback is that it often engenders defensiveness. When this occurs, the feedback is not likely to be useful.

General vs Specific Feedback

When Marie responded to George by saying, "When you said, 'I wish I could be more selfish, like you,' I felt angry and degraded," she was describing a *specific* behavior. If she had said, "You are hostile," she would have been giving feedback in *general* terms; George might not have known to which behavior she was reacting. The term "hostile" does not specify *what* evoked a response in Marie. If George wanted to change he would not know what behavior to change. However, when the sender is specific, the receiver knows to what behavior the sender is responding, which he can then change or modify. Feedback expressed in general terms, such as "You are a warm person," does not allow the receiver to know what specific behavior is perceived as warm. He cannot expand or build on this feedback until he knows which behavior evoked the response "warm."

Pressure to Change vs Freedom of Choice to Change

When Marie told George that she felt angry and degraded by George's statement, she did not tell him he had to change his behavior. If she or the feedback were important to George, however, he would probably change anyway; if these were not important to him, he might decide not to change. A person should have the freedom to use feedback in any meaningful way without being required to change. When the giver of feedback tells a person to change, he is assuming that he knows the correct standards for right and wrong or good and bad behavior and that the receiver needs to adopt those standards for his own good (or to save the sender the trouble of changing). Imposing standards on another person and expecting him to conform arouses resistance and resentment. The sender assumes that his standards are superior. A major problem in marriages arises when spouses tell each other that they must change their behaviors and attitudes to conform with one or the other partner's expectations and demands. These pressures to change can be very direct or very subtle, creating a competitive, win-lose relationship.

Expression of Disappointment as Feedback

Sometimes feedback reflects the sender's disappointment that the receiver did not meet his expectations and hopes. For example, a group leader may be disappointed that a member did not actualize his potential impact on the group, or a professor may be disappointed in a student's lack of achievement. These situations represent a dilemma. An important part of the sender's feedback is his own feelings, whether they are disappointment or satisfaction; if he withholds these feelings and/or perceptions, he may give the receiver a false impression. If, however, he expresses his disappointment, the receiver may experience this feedback as an indication of personal failure instead of as an incentive to change.

Persistent Behavior

Frequently the complaint is heard that a group member persists in a behavior that others find irritating, despite the feedback he receives. Group members exclaim, "What are we supposed to do? He won't change!" The most the members can do is to continue to confront the offender with their feelings. While he has the freedom not to change, he will also have to accept the consequences of his decision, i.e., other people's continuing irritation at his behavior and their probable punitive reactions. He cannot reasonably expect other group members both to feel positive toward him and to accept the behavior they find irritating.

The only person an individual can change is himself. As a by-product of his change, other people may change in relationship to him. As the individual changes, others will have to adjust their behavior to his. No one should be forced to change. Such pressure may produce superficial conformity, but also underlying resentment and anger.

Delayed vs Immediate Timing

To be most effective, feedback should, whenever possible, be given immediately after the event. In the initial example of the exchange between George and Marie, if Marie had waited until the next day to give feedback, George might have responded with "I don't remember saying that," or if Marie had asked the other group members later they might have responded with only a vague recollection; the event had not been significant to them, although it had been to Marie.

When feedback is given immediatley after the event, the event is fresh in everyone's mind. It is like a mirror of the person's behavior, reflected to him through feedback. Other group members can also contribute their observations about the interaction. There is often, however, a tendency to delay feedback. A person may fear losing control of his feelings, fear hurting the other person's feelings, or fear exposing himself to other people's criticisms. Nevertheless, although the "here-and-now" transactions of group life can often be most threatening, they can also be most exciting and growth producing.

Planned Feedback

An exception to this guideline is the periodic feedback session, planned to keep communication channels open. Staff members in work units or departments may have weekly feedback meetings, or a specific time may be set aside for structured or unstructured feedback sessions in one- or two-week workshops. In these scheduled sessions, participants may cover events occurring since the last session or may work with material generated during their current meeting. For this process to be effective, however, the decision to have these feedback sessions should be reached through a consensus of the participants.

External vs Group-Shared Feedback

When feedback is given immediately after the event, it is usually group shared, so that other members can look at the interaction as it occurs. For example, if group members had reacted to

George's statement ("I wish I could be more selfish, like you") by saying, "If I were in your shoes, Marie, I wouldn't have felt degraded" or "I did not perceive it as degrading," then Marie would have had to look at her behavior and its appropriateness. If, on the other hand, group members had supported Marie's feelings and perceptions (consensual validation), her feedback would have had more potency.

Events that occur outside the group ("there-and-then") may be known to only one or two group members and, consequently, cannot be reacted to or discussed meaningfully by other participants. In addition, other group members may feel left out during these discussions. For example, when a group member is discussing an argument he had with his wife, the most assistance group members can provide is to attempt to perceive from his behavior in the group what occurred in that interaction and to share these conjectures with him. Since, in describing the event, the group member's perception is colored by his own bias and emotional involvement, group members may receive a distorted picture of the argument and may not be able to discriminate between fact and fiction. If the argument had occurred in the group, however, group members could have been helpful since they would have shared the event. Then, if the involved group member had begun describing his perceptions of what happened, other group members could have commented on or shared their perceptions of the interaction.

Use of There-and-Then

In other words, events within the group can be processed by all group members who witness the interaction; they can share their perceptions and feelings about what occurred. This does not mean that group members cannot get *some* value from describing events external to the group and receiving comments from other members. What happens frequently, however, is that the group member describes these events in such a way as to elicit support or confirmation of his own perceptions rather than objective evaluation. Yet this relation of there-and-then events to the here-and-now can often be extremely productive as back-home "bridges." It can also be productive when some members have had long-term relationships with one another. It is important, at these times, to recognize both the necessity and the difficulty of involving other group members in the discussion.

Consistent Perceptions

Shared perceptions of what happens in here-and-now events is one of the primary values of a group. "Group shared" also implies that, ideally, each member has to participate. Frequently a person gets feedback from *one* member in the group and assumes that the rest of the group feels the same. This is not always a correct assumption. Feedback from only one person may present a very private or distorted picture because that person's perceptions of the event may differ from other group members'. When everyone's reactions are given, however, the receiver has a much better view of his behavior. If the group members are consistent in their perception of the receiver, and this disagrees with the receiver's view of himself, then he needs to look more closely at the validity of his self-perceptions. Frequently the fact that people perceive an individual's behavior differently is useful information in itself. Part of each group member's responsibility is to ask for feedback from members who are not responding so that the receiver will know how everyone sees his behavior. The receiver may have to be somewhat aggressive and persistent in seeking this information. Group members may tend to say "me, too" when their feedback is being given by someone else. When *all* the data have been obtained, the receiver is in a better position to make a more effective decision regarding his use of the feedback.

Imposed vs Solicited Feedback

In most exchanges, feedback is usually imposed. People give feedback whether it is solicited or not and whether the person is prepared to receive it or not. In addition, the sender's need to give feedback may be much greater than the individual's need to receive it. This is particularly true when the sender is upset about something concerning the potential recipient. In many situations, it is legitimate to impose feedback, particularly when a norm exists for giving as well as for soliciting feedback, or in order to induce a norm of spontaneity. However, feedback is usually more helpful when the person solicits it. Asking for feedback may indicate that the receiver is prepared to listen and wants to know how others perceive his behavior.

In asking for feedback, however, it is important to follow some of the same guidelines as for giving feedback. For example, a person should be specific about the subject on which he wants feedback. The individual who says to the group, "I would like the group to tell me what they think about me" may receive more feedback than he planned. In addition, the request is so general that the group members may be uncertain about where to begin or which behaviors are relevant to the request. In these cases, other group members can help the receiver by asking such questions as "Can you be more specific?" or "About what do you want feedback?" Feedback is a reciprocal process; both senders and receivers can help each other in soliciting and in giving it.

Sometimes it is also important to provide feedback on how a person is giving feedback. If a receiver is upset, hurt, or angry, other group members can say to the sender, "Look how you told him that; I would be angry, too" or "What other way could you have given him the same information without evaluating him or degrading him?" It is desirable to give feedback so that the receiver can preserve his self-esteem.

Many people want to know how their behavior is being perceived by others, but they fear the consequences of asking for such information. How easily a person will ask for feedback is related to the amount of trust in the interpersonal relationship. However, people fear that the receiver will use their feedback (particularly negative feedback) to reinforce his negative feelings about himself. Again, it is sometimes difficult for a person to separate his behavior from his feelings of self-worth.

Unmodifiable vs Modifiable Behavior

To be effective, feedback should be aimed at behavior that is relatively easy to change. Many individuals' behaviors are habitual and could be described as a personal style developed through years of behaving and responding in certain ways. Feedback on this kind of behavior often is frustrating because the behavior can be very difficult to change.

Feedback on behaviors that are difficult to change may often make the person self-conscious and anxious about his behavior. For example, if the wife of a chain smoker gives him feedback (using all of the appropriate guidelines) about his smoking behavior, it would still be very difficult for him to change. Chain-smoking is a behavior determined by often unknown causes. The individual may smoke to reduce his tension level; continuous feedback on his smoking behavior may only increase his tension. Consequently, he smokes more to reduce that tension.

Occasionally, in giving feedback, one must determine whether the behavior represents an individual's life style or results from some unknown personality factors. Sometimes it may be helpful first to ask the receiver whether he perceives his behavior as modifiable. Many behaviors can be easily changed through feedback and the person's conscious desire to change his behavior in order to produce a more effective interpersonal style.

Motivation to Hurt vs Motivation to Help

It is assumed that the primary motivation of membership in growth groups is to help oneself and others to grow. When an individual is angry, however, his motivation may be to hurt the other person. Frequently, the conflict turns into win-lose strategies in which the goal of the interaction is to degrade the other person. It is difficult when one is angry to consider that the needs of the other person are as important as one's own. Angry feedback may be useless, even when the information is potentially helpful, because the receiver may need to reject the feedback in order to protect his integrity.

Coping with Anger

There are several ways to cope with anger. One is to engage in a verbal or physical attack that frequently increases in intensity. Another method to deal with anger is to suppress it. One consequence of this strategy, however, is that the individual builds internal pressure to the point that he can lose control of his behavior. A third--and better--method is to talk about personal feelings of anger without assigning responsibility for them to the other person. Focusing on personal feelings may frequently encourage other group members to help the individual. In this way the anger dissipates without either viciousness or suppression. Anger and conflict are not themselves "bad." Angry feelings are as legitimate as any other feelings. Conflict can be a growth-producing phenomenon. It is the manner in which conflict or angry feelings are handled that can have negative consequences. Only through surfacing and resolving conflicts can people develop competence and confidence in dealing with these feelings and situations. Part of the benefit derived from growth groups is learning to express anger or to resolve conflicts in constructive, problem-solving ways.

CONCLUSION

The process of giving feedback obviously would be hampered if one attempted to consider *all* of the above guidelines. Some are needed more frequently than others: i.e., feedback should be descriptive, nonevaluative, specific, and should embody freedom of choice. These guidelines can also be used diagnostically. For example, when the person receiving feedback reacts defensively, some of the guidelines have probably been violated. Group members can ask the receiver how he heard the feedback and help the giver assess how he gave it.

Giving feedback effectively may depend on an individual's values and basic philosophy about himself, about his relationships with others, and about other people in general. Certain guidelines, however, can be learned and are valuable in helping people give and receive effective and useful feedback.

GIVING FEEDBACK: A CHECKLIST

Rating scales for some of the feedback guidelines in "Giving Feedback: An Interpersonal Skill" are listed below. For each item, draw a circle around the number on each scale that best characterizes your feedback style. Concrete examples for each item are helpful.

1.	*Indirect Expression of Feeling.* Not describing your own emotional state, e.g., "You are a very likeable person."	1 2 3 4 5	*Direct Expression of Feeling.* "Owning" your own feelings by describing your emotional state, e.g., "I like you very much."
2.	*Attributive Feedback.* Ascribing motives to behavior, e.g., "You are angry with me."	1 2 3 4 5	*Descriptive Feedback.* Observing and describing the behavior to which you are reacting, e.g., "You are frowning and your hands are clenched in a fist."
3.	*Evaluative Feedback.* Passing judgment on another person's behavior or imposing "standards," e.g., "You *shouldn't* be so angry."	1 2 3 4 5	*Nonevaluative Feedback.* Commenting on behavior without judging its worth or value, e.g., "Your anger is as legitimate a feeling as any other."
4.	*General Feedback.* Stating broad reactions and not indicating specific behaviors, e.g., "You're pretty touchy today."	1 2 3 4 5	*Specific Feedback.* Pointing out the specific actions to which you are reacting, e.g., "When you frowned, I felt anxious."

5. *Pressure to Change.* Implying that people are not behaving according to your standards, e.g., "Don't call me 'Sonny'!"	1 2 3 4 5	*Freedom of Choice to Change.* Allowing others to decide whether they want to change their behavior, e.g., "When you called me 'Sonny' I felt put down."
6. *Delayed Feedback.* Postponing feedback to others' behavior until later, e.g., "I was really hurt yesterday when you ignored me."	1 2 3 4 5	*Immediate Feedback.* Responding immediately after the event, e.g., "I'm feeling hurt because you're not responding to me."
7. *External Feedback.* Focusing attention on events *outside* the group, e.g., "My friends see me as being very supportive."	1 2 3 4 5	*Group-Shared Feedback.* Focusing attention on events that occur *in* the group, e.g., "Does this group see me as being very supportive?"

Share your ratings with your group and solicit feedback from group members as to how they would rate your feedback style. On the basis of your own ratings and the feedback you received from other group members, check those items on which you want to work and on which you want continuing feedback from the group. Giving feedback effectively is a skill that can be developed.

WHAT TO LOOK FOR IN GROUPS

Adapted from *The 1972 Annual Handbook for Group Facilitators*, J.W. Pfeiffer, Ph.D., & J. C. Jones, Ph.D., Eds. La Jolla, Calif.: University Associates Publishers, Inc., 1972, pp. 21-26.

WHAT TO LOOK FOR IN GROUPS

All human interactions have two major ingredients--content and process. The first deals with the subject matter or the task with which the group is working. In most interactions, the main focus is on the content. The second ingredient, process, is concerned with what is happening between and to group members while the group is working. The group process, as it emerges in this course, encompasses tone, atmosphere, influence, participation, styles of influence, leadership struggles, conflict, competition, and cooperation. In most interactions, very little attention is paid to process, even when it is the major cause of ineffective group action. Sensitivity to group process will better enable trainers to diagnose group problems early, deal with them more effectively, and will enable trainees to be more effective participants.

Below are some guidelines to help trainers analyze group behavior. They should remember to use female-male behavior exhibited in the group to illustrate points made in the course.

PARTICIPATION

Verbal participation is one indication of involvement. Trainers should look for differing amounts of participation within the group and, specifically, differences between men and women.

- *Who participates more than others?*
- *Who participates less?*
- *Do you see any shift in participation, e.g., frequent participators becoming quiet, infrequent participators suddenly becoming talkative? Do you see any possible reason for this in the group's interaction?*
- *How are those who remain silent treated? How is their silence interpreted--consent, disagreement, disinterest, fear, etc.?*
- *Who talks to whom? Do you see any reason for this in the group's interactions? Are the interactions male/male, male/female, or female/female?*
- *Who keeps the ball rolling? Shy? Do you see any reason for this in the group's interactions?*

INFLUENCE

Influence and participation are not the same. Some people may speak very little yet they capture the attention of the whole group. Others may talk a lot but are generally not listened to by other members.

- *Which members are high in influence? That is, when they talk, do others seem to listen? Are they women or men?*
- *Which members are low in influence? Is there any shifting in influence? Who shifts, women or men?*
- *Do you see any rivalry in the group? Is there a struggle for leadership? What effect does it have on other group members?*

Styles of Influence

Influence can take many forms. It can be positive or negative; it can enlist the support or cooperation of others or alienate them. How a person attempts to influence another may be the determining factor in the other's receptivity. There are at least four styles of influence that frequently emerge in groups.

- Autocratic--*Does anyone attempt to impose her will or values on others or try to push them to support her decisions? Who evaluates or passes judgment on other group members? Do any members block action when it is not moving in the direction they desire? Who pushes to "get the group organized?"*
- Peacemaker--*Who eagerly supports other's decisions? Does anyone consistently try to avoid conflict or unpleasant feelings from being expressed by pouring oil on the troubled waters? Is any member typically deferential toward other group members (thus giving others power)? Do any members appear to avoid giving negative feedback, i.e., will they level only when they have positive feedback to give?*
- Laissez-faire--*Are any group members getting attention because of their apparent lack of involvement in the group? Does any group member go along with group decisions without seeming to commit herself one way or the other? Who seems to be withdrawn and uninvolved? Who does not initiate activity, or participates mechanically and only in response to another member's question? Are they women or men?*

- Democratic--*Does anyone try to include everyone in a group discussion or decision? Who expresses her feelings and opinions openly and directly without evaluating or judging others? When feelings run high and tensions mount, which members attempt to deal with the conflict in a problem-solving way?*

DECISION-MAKING PROCEDURES

Many decisions are made in groups before full consideration has been given to the effects these decisions will have on other members. Some people try to impose their decisions on the group, while others want all members to participate or share in the decisions that are made.

- *Does anyone make a decision and carry it out without checking with other group members (self-authorized)? For example, does anyone decide on the topic to be discussed and immediately begin to talk about it? What effect does this have on others?*
- *Does the group drift from topic to topic? Who topic jumps? Do you see any reason for this in the group's interactions?*
- *Who supports other members' suggestions or decisions? Does this support result in the two members deciding the topic or activity for the group? How does this affect others?*
- *Is there any evidence of a majority pushing a decision through over other members' objections? Do they call for a vote (majority support)?*
- *Is there any attempt to get all members participating in a decision (consensus)? What effect does this seem to have on the group?*
- *Does anyone make contributions that receive no response or recognition? What effect does this have on the member?*

MEMBERSHIP

A major concern for group members is the degree to which they are accepted by the group. Different patterns of interaction may develop in the group that give clues to the degree and kind of membership.

- *Are there any subgroups?* (Two or three members may band together for a period of time during which they consistently agree and support each other. Or several members may consistently disagree and oppose one another.)

- *Do some people seem to be "outside" the group? Are some "in?" How are those "outside" treated?*

FEELINGS

During any group discussion, feelings are frequently generated by the interactions between members. Although these feelings are rarely discussed, the tone of voice, facial expressions, gestures, and many other forms of nonverbal cues can help observers understand what participants are feeling.

- *What signs of feelings do you observe in group members (anger, irritation, frustration, warmth, affection, excitement, boredom, defensiveness, competitiveness)?*

- *Do you see any attempts by group members to block the expression of feelings, particularly painful feelings? How is this done? Does anyone do this consistently?*

Adults bring some special resources to the learning situation; they have a great deal of experience from which to draw. Problems that might be purely theoretical to an adolescent are real to an adult who has some experience coping with them. Knowledge based on experience is especially important because there are no easy answers or theoretical solutions to the many problems connected with drug abuse.

TASK FUNCTIONS

There are certain functions that should be carried out in order to get the job done. The trainers will improve their understanding of the process if they take a look at how these functions are accomplished.

- *Does anyone ask for or make suggestions as to the best way to proceed or to tackle a problem?*

- *Does anyone attempt to summarize what has been covered or what has been going on in the group?*

- *Is there any giving or asking for facts, ideas, opinions, feelings, feedback, or searching for alternatives?*

- *Who keeps the group on target? Who prevents topic jumping or going off on tangents?*

MAINTENANCE

These functions are important to the morale of the group. Their performance (or the lack thereof) can maintain or destroy good and harmonious working relationships among the members. When properly carried out, these functions can create an atmosphere that enhances each member's ability to contribute maximally.

- *Who helps others get into the discussion (gate openers)?*
- *Who cuts off others or interrupts them (gate closers)?*
- *How well are members getting their ideas across? Are some members preoccupied and not listening? Are there any attempts by group members to help others clarify their ideas?*
- *How are ideas rejected? How do members react when their ideas are not accepted? Do members attempt to support others when they reject their ideas?*

GROUP ATMOSPHERE

The way a group works creates an atmosphere that, in turn, is revealed in a general impression. Trying to capture this impression in words will give the trainer some insight into what people do and don't like about the training environment.

- *Who seems to prefer a friendly congenial atmosphere? Is there any attempt to suppress conflict or unpleasant feelings?*
- *Who seems to prefer an atmosphere of conflict and disagreement? Do any members provoke or annoy others?*
- *Do people seem involved and interested? What is the atmosphere like?*
- *Are certain topics avoided in the group (e.g., sex, talk about immediate feelings in the group, discussing the leader's behavior, etc.)?*
- *Who seems to reinforce this avoidance? How?*

- Are group members overly nice or polite to each other? Are only pleasurable feelings expressed? Do members agree with each other too readily? What happens when members disagree?

- Do you see norms operating about participation or the kinds of questions that are allowed (e.g., "If I talk, you must talk," or "If I tell my problems, you have to tell yours")? Do members feel free to ask each other about their feelings? Do questions tend to be restricted to intellectual topics or events outside of the group?

HIDDEN AGENDAS

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HIDDEN AGENDAS

Any group works on two levels: the level of the surface task with which the group is immediately concerned, and the level of the hidden, undisclosed needs and motives of its individual members. Participants' aspirations, attitudes, and values affect the way they react to the group's surface task. Such individual "hidden agendas" siphon off valuable energy that could be used for accomplishing the task at hand and for group maintenance.

Understanding how these hidden agendas work in the life of a group helps the group achieve its common goal more efficiently.

INDIVIDUAL NEEDS

A person joins a group in order to fulfill or express certain personal needs. His behavior as a member of that group is neither random nor haphazard: it is keyed to his personal motivations, which may be social or emotional, explicit or hidden to the group, known or unknown to the individual himself.

Needs, of course, take different forms and can be satisfied in different ways for different people. Physical and security needs are basic: an individual must have food, shelter, and warmth in order to maintain life; if he is not to be overwhelmed by anxiety, he must also achieve some security and stability in his environment.

When such basic survival needs are met, other needs press for satisfaction. An individual has social, ego, and self-fulfillment requirements as well. These are the needs that can best be fulfilled in a group situation; thus, their satisfaction is often the individual's motivation for joining a group.

As individuals seek acceptance from others, social needs become apparent; when these are filled, the person's ego presses for its satisfaction. Finally, as the individual begins to understand his own unique identity, he can become fully himself.

Hidden Needs

Hidden beneath the surface of the group's life are many individual, conflicting currents: its members' needs for belonging, acceptance, recognition, self-worth, self-expression, and productivity.

Such needs are personal and subjective, but they are not necessarily "selfish." Looking for the satisfaction of personal needs through group membership is both "normal" and "natural." We are not concerned here with the question of how or whether these needs should be satisfied, but with their effect on the group as a whole.

If *one* individual's needs block another from achieving *his* needs, or if such personal needs hinder the group from accomplishing its goals, then we become concerned. We want to legitimize the individual's fulfillment of his needs in ways that do not raise obstacles for other members of the group.

SOME SUGGESTIONS FOR LEADERS

The leader should keep in mind the fact that a group continuously works on both the hidden and the surface levels. Hidden agendas may prevent the group from moving as fast as participants would like or expect.

What can be done about hidden agendas.

1. The leader can look for hidden agendas and learn to recognize their presence.
2. A group member may help surface hidden agendas. He may say, for example, "I wonder if we have said all that we felt about the issue. Maybe we should take time to go around the table and ask for individual comments so that we can open up any further thoughts."
3. Hidden agendas can be brought into the open and discussed. But not all hidden agendas can be confronted successfully by a group; some are best left under the surface.
4. The leader should not criticize the group for the presence of hidden agendas; they are legitimate and must be worked with just like the surface task. The amount of attention that should be given to the hidden agendas depends on the degree of their influence on the group's task.
5. The leader should help the group find the means of solving hidden agendas. Problem-solving methods are needed, though techniques vary.
6. The group should spend some time evaluating its progress in handling hidden agendas. The last fifteen minutes of a meeting devoted to such evaluation is often very helpful.

Better and more open ways of dealing with hidden agendas should become apparent through experience. And as groups mature, hidden agendas are often reduced, thus increasing the amount of energy the group has to devote to its surface tasks.

THEORIES OF GROUP DEVELOPMENT

As you read the following paper, take notes in preparation for a discussion on group development.

Phase I

Phase II

Phase III

Phase IV

THEORIES OF GROUP DEVELOPMENT

Human groups are constantly changing. Issues that were critical in the first session evaporate by the fourth session; the excitement in session three is followed by boredom in session seven. Moods fluctuate, central concerns grow and decline in importance. The group has a life of its own; its primary characteristic is movement. Groups, like individuals, are unique, but they appear to share some similar attributes. These observations have been made repeatedly by students of group behavior and are the bases for the many theories of group development (Banet, 1976).

FUNCTIONS OF GROUP DEVELOPMENT THEORIES

Theories of group development serve descriptive and predictive functions. For the group leader, the theory provides a rationale for making certain kinds of interventions in the group process to highlight and clarify relevant training issues.

> On a descriptive level, ...[group development] theory permits the observer to organize his perceptions. During a given slice of group life, verbal behavior, the interaction pattern, emotional climate, or type of content can be characterized and measured. Whatever the observational base, descriptions of group phenomena in a given session can be compared and contrasted with those from a past or future session.
>
> Used predictively, developmental theory enables the observer to forecast the group's future process. The theory describes what *should* be happening, at least under ideal conditions, so that ...[goals] can be set. The predictive aspect offers comfort to the group practitioner: events will not always be as conflicted or sluggish as they appear to be in a given session.
>
> A particular theory also provides the group leader with cues for specific interventions. The leader may want to accelerate the process, slow it down, or freeze or focus it to insure that a group does not avoid or ignore opportunities for learning. Equipped with theory, the leader may plan or design interventions intended to surface and

> clarify process issues that he regards as important.
>
> Developmental theory is a particularly helpful guide to amplifying issues that groups frequently find troublesome: dependency, authority, conflict, power, and intimacy (Banet, 1976).

Group development theory, therefore, is a set of formal or informal assumptions about group life that gives the trainer a means to predict how individuals will behave in the group, what group phenomena are likely to occur, and how the group will grow and develop over time. A group theory reveals order and pattern in a seemingly random or chaotic situation (Banet, 1974).

In all groups there are two components to consider: (1) personal relations (the development of interpersonal relationships among group members) and (2) the task (the work to be performed by the group). When shared with the group, a model helps the members--

- identify the stages of development experienced by the group;
- assume personal responsibility for assisting each other in the process of group development;
- anticipate kinds of group interaction problems;
- diagnose interaction problems and work through issues that might otherwise hinder or destroy the group or substantially decrease its membership;
- learn to work more effectively by reviewing the mass of data that is generated in group interactions to discover how the work gets done, how decisions get made, how people get included, etc.;
- diagnose the resources that are available within the group itself; and
- increase their awareness of ways to help the group manage its own development (Jones, 1973).

THE TRAINER'S THEORETICAL ORIENTATION

At present, no single theory of group development adequately accounts for all group phenomena reported by observers. Events that are commonplace in a Tavistock conference, for instance, may never surface in a team-building session. Individual "implosions" occur in a Gestalt workshop, but rarely in a communication-skills laboratory. Some groups spend half their lives working on authority issues; others focus on this issue only momentarily before moving on to more positive, intimate interactions.

It appears that these discrepancies can be attributed to the trainer's belief in a particular theory of group development. Believing that certain things will occur often makes them happen. The theory, as an observational tool, influences what is being observed. As Butkovich et al (1975) state in a recent study, there is a strong "possibility that the group leader's theoretical orientation, as it is reflected in his interpretations and behavior, is causally related to the very group behavior being interpreted."

This contamination (by the observer) of what is being observed is prevalent in all applied behavioral science. Such contamination does not discredit a theory, but serves to remind us that a "truth" has been filtered through the built-in biases and distortions of a human observer. It does, however, raise a difficult methodological issue: some process elements (transference, for example) may in truth be artifacts of the observational tool employed. What is reported as group-process event may exist only in the mind of the observer. As Lundgren (1971) has demonstrated, the pace and pattern of group process, as well as specific group phenomena, are directly related to the intervention stance prescribed by the leader's theory of group development. Therefore, this is a primary problem in utilizing group development theories.

Too often trainers arrive at (or accept) one model of group development that they then use (and impose) on the group to predict its behavior. Trainers need to examine critically whatever model they espouse in light of their own and others' experiences and current research on group behavior.

THE INTERRELATION OF CONTENT, PROCESS, AND STRUCTURE

In a group development theory, the content, process, and structure of a group are closely interrelated. Content (*what* topic is being discussed) is determined by the group's task--whether that task is to make decisions, learn new information, overcome resistances to growth, or experiment with new behavior. Group process refers to *how* a group behaves. Process elements include events happening inside individual members, those happening within the group such as the development of norms, and the impact on the group of such variables as their individual past histories and experiences outside of the group. In the life of a group, content and process are continually occurring.

The structure of the group determines the extent to which content and process *visibly* interrelate and influence each other. Structure includes such elements as:

- The group's objectives
- The leader's attitude toward the group resulting from the theory he espouses
- The contract between the leader and the group
- The ground rules to which the group subscribes
- The organization and sequence of the group's activities

Structure can also refer to the physical environment in which the group lives and how the environment effects the group.

Group structure can be tight and rigid--e.g., no process elements are recognized by the group as being part of its agenda--or it can be so loose that the process itself becomes the content, as in a sensitivity or encounter group. To some extent, the profusion of group development theories is a result of the variety of group structures observed by theorists. Some groups may be structured to allow fifteen phases of process to develop; other groups, only one or two.

Depending on the purpose of the group and how the group is structured, the trainer focuses on certain specific process elements and makes decisions about guiding the group. A five-day workshop on task analysis, for example, would focus on content rather than process. The trainer needs to be aware of group process, but process intervention would be made only to facilitate the learning of content. The trainer's contract with the group would be to teach each member specific content and skills. Therefore, he would probably not make a process intervention to focus on the roles members play in groups.

A second example is that of a five-day course in couselor training whose goals are (1) to assist participants to become aware of the problems that hinder their ability to counsel drug addicts effectively, and (2) to teach participants certain counseling skills, such as empathic listening. In this case the trainer would make many more process interventions, both to facilitate the group's work and also to help participants recognize process aspects within the counseling situation. The trainer, however, would not allow the course to become a sensitivity, encounter, or therapy session--something that is not part of the contract between trainer and the group.

Too much or too little attention to process endangers the group's task function--it's reason for being. Each intervention by a trainer is a creative decision made to enrich the content. In every case, a trainer contracts with a group to provide training for a given purpose and to accomplish certain objectives. This, then, provides the initial structure, which is further defined by the ground rules and trainer-member participation.

FOUR PHASES OF GROUP DEVELOPMENT

The group development model followed in TOT combines aspects of theories put forth by Jones (1973), Tuckman (1965), and Banet (1976). Jones describes a four phase model, each phase of which is analyzed in terms of group members' concerns with personal relations (process) functions and task functions. Since Jones's model describes events that are commonly experienced by groups organized for a purpose such as a training course, the TOT model is based on Jones's formulations.*

TOT Model		
Phase	Task Functions	Personal Relations Functions
1	Orientation	Testing and Dependence
2	Organizing to Get Work Done	Intragroup Conflict
3	Information-flow	Group Cohesion
4	Problem-solving	Interdependence

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*Some of the other models of group development are based on a psychiatric model (e.g., Bion, 1959).

Explanation of the Phases

Phase I

Task: Orientation

In the first phase, the needs of group members are to be oriented to the task, that is, to define the task, specify issues, identify expectations, and explore the nature of the work. From this members develop a common understanding of the group's purpose that begins to answer the questions: Why are we here? What are we supposed to do? How are we going to get it done? And, what are our goals?

Personal Relations: Testing and Dependency

In the first phase, participants generally act as if they depend on the leader to provide all the structure. They look to the leader to set the ground rules, establish the agenda, to do all the "leading," while the group members acclimate themselves to the setting. Feelings involved are excitement, apprehension, and confusion. Group members exhibit behavior to test what behavior is acceptable and what is taboo, and begin to establish boundaries, to consider themselves as individuals vis-a-vis the group, and to define the function of the group and the leader.

Concluding Phase I

This phase generally concludes when there is general agreement that the goals are achievable and that change is possible--whether it be changing behavior, making a decision, or solving a problem.

Phase II

Task: Organizing to Get Work Done

Organizing to get work done involves a number of group decisions. These include:

- Establishing work rules
- Determining limits
- Defining the reward system

- Setting the criteria for the task
- Dividing the work
- Assigning individual responsibility for particular tasks

Personal Relations: Intragroup Conflict

Participants bring to a group activity unique perspectives and many unresolved conflicts with regard to authority, dependency, rules, and agenda. The result is that groups experience interpersonal conflict as they organize to get work done. The conflict may remain hidden, but it is there.

The variety of organizational concerns that emerges reflects the interpersonal conflict over leadership and leadership structure, power, and authority.

Awareness of the possibility of change that was begun in Phase I, becomes a denial of the possibility of and the need for change; group members adhere instead to one or another extreme. The feeling level is marked by dependency on old ways and resistance to take the risks that work and change require.

This polarizing effect of early group interaction is documented in the work of Myers and Lamm (1975). After some initial effort to alter previously held positions, group members revert to their previous, pre-group stance and fight to maintain it. This phenomenon, variously described as regression or resistance, seems to occur when the group is perceived as an arena wherein deep-seated values, beliefs, and world views can be challenged. During this phase, the atmosphere is tense and much work is accomplished.

Concluding Phase II

This phase concludes when group members have struggled enough with each other to resolve, partially, their personal relations concerns (similarities to and differences from other group members, authority, dependency, and leadership) and have agreed upon how they will organize to do the work. This allows issues to emerge that are sufficiently important for the group as a whole to consider.

Phase III

Task: Information Flow

Participants begin sharing ideas and feelings, giving and soliciting feedback, exploring actions, and sharing information related to the task. This is a period during which people become gradually more comfortable about being part of a group. There is an emerging openness with regard to the task.

Personal Relations: Group Cohesion

It is during the third stage of development (assuming the group gets this far) that the participants, having resolved interpersonal conflict, begin to experience catharsis and a feeling of belonging to a group. This enables the group to focus on the task. Different points of view enrich the group process.

This phase is marked by the emergence of a "both/and" attitude on the part of group members, which replaces the "either/or" thinking of Phase II. Power and authority are seen as residing both in the group and in its members. In many theories this is the central period of group development.

During this stage there is sometimes a brief abandonment of the task in which a period of play, an enjoyment of the cohesion being experienced, takes place.

Concluding Phase III

When it becomes apparent that there has been learning in the form of new insights and new solutions to problems, the group moves into phase four.

Phase IV

Task: Problem Solving

During Phase IV, the group's tasks are well-defined, there is a commitment to common activity, and there is support for experimentation in solving problems.

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Personal Relations: Interdependence

Stage four, which is not achieved by many groups, is characterized by interdependence in personal relations. Interdependence means that members have the ability to work singly, in any subgroup, or as a total unit.

The group's activities are both collaborative and functionally competitive. The feelings are focused on enjoyment of the here and the now. A reflective, meditative silence coexists with playful and pleasurable interaction with others. The task seems completed and there is a need for closure, repose, and quiet.

This movement is marked by integration and celebration. Much work is accomplished; previously difficult issues are simply and easily resolved. There may be attempts by some members of the group to "freeze" change and the group may decide to stop its work here.

Concluding Phase IV

If it develops the awareness that this apparent end point offers the possibility for a new beginning, the group may begin at this new starting point and work through each of the four phases in a somewhat different fashion.

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MODULE III:

FROM NEEDS ASSESSMENT TO BEHAVIORAL OBJECTIVES

MODULE III: FROM NEEDS ASSESSMENT TO BEHAVIORAL OBJECTIVES

PERSPECTIVE

The purpose of this module is to teach participants how to identify training needs, formulate training goals, and write behavioral objectives. The group development process is reviewed and the roles of the trainer in the training process are discussed. The phases of the training process from needs assessment to writing behavioral objectives are examined. This module includes:

- Review of Day One/Overview of Module III
- Group Discussion: What Is a Trainer?
- Structured Experience: The Roles of the Trainer in the Training Process
- Individual Learning Activity: TAS One, Introduction to Needs Assessment
- Lecture/Discussion: Needs Assessment
- Individual Learning Activity: TAS Two, Translating Problems into Training Needs
- Lecture/Discussion/Practice: Developing Training Goals and Writing Behavioral Objectives
- Individual Learning Activity/Discussion: TAS Three, Formulating Training Goals and Behavioral Objectives
- Summary of Module III and Overview of Module IV

BEHAVIORAL OBJECTIVES

Using the information presented in Module III as criteria, at the end of this module, and without the aid of notes, participants will be able to:

1. Identify at least three phases of group development
2. Define the following terms:

   I - needs
   We - needs
   It - needs

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3. Identify at least three roles performed by the trainer in each phase of the training process
4. Identify at least five steps that a trainer should follow when conducting a needs assessment
5. Identify at least three reasons why a needs assessment should be conducted prior to training
6. Given a case situation, translate at least three problems into statements of training needs
7. Given three training needs, correctly formulate one training goal for each
8. Given three behavioral objectives, correctly identify the terminal behavior, criteria, and conditions for each
9. Given a training goal, formulate at least two behavioral objectives; each behavioral objective must relate to the goal and contain terminal behavior, criteria, and conditions

MODULE III: FROM NEEDS ASSESSMENT TO BEHAVIORAL OBJECTIVES

DISCUSSION: THEORIES OF GROUP DEVELOPMENT

The Stages of Group Growth

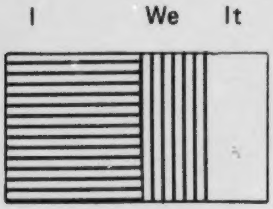
During every group interaction, three types of needs are present: individual needs, group needs, and task needs. The length of time spent on each type of need depends upon many variables, a major one being the phase of group development.

I = Personal Needs -- getting oriented to the group, finding out whether one's personal needs will be met

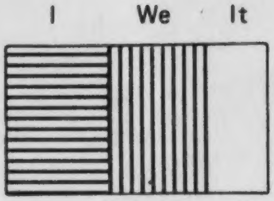
We = Group Needs -- developing useful membership roles, ground rules, procedures, and group structures as needs emerge

It = Group Task -- focusing on the agreed-upon objective(s)

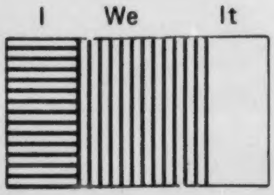
The following diagram shows different stages in the evolution of a group:



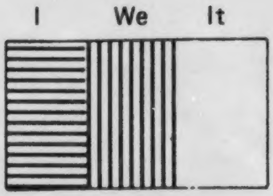
Phase I: Orientation, Testing, and Dependency



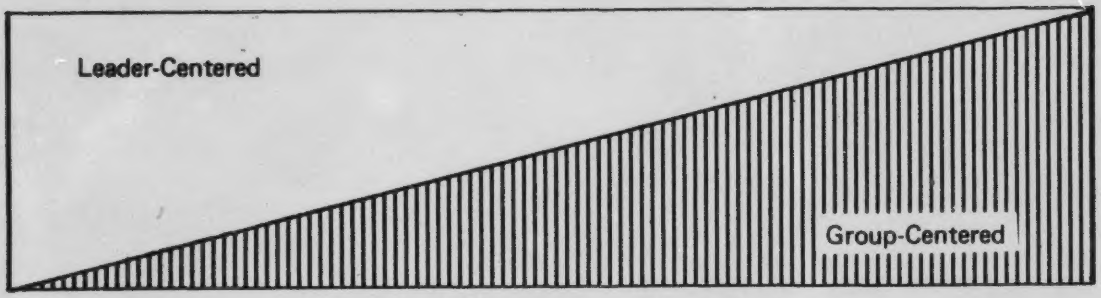
Phase II: Organizing to Get Work Done, IntraGroup Conflict



Phase III: Information-flow, Group Cohesion



Phase IV: Problem-solving, Interdependence



Leader decides, announces decision	Leader decides, sells decision	Leader presents ideas, invites questions	Leader presents tentative idea subject to change	Leader presents alternatives, group decides	Leader defines boundaries, group decides	Group defines boundaries and decides

Conditions	*Conditions*
a. Time factor and urgency of decision	a. No time pressure
b. Emergency	b. No emergency
c. Individual knowledge	c. Group knowledge
d. Lack of group skills	d. Group skills
e. Expectation of leader's role	e. Expectation of the group role
f. Legal responsibility	f. Freedom of responsibility

Reprinted with permission from: Napier, Rodney W. and Matti K. Gershenfeld, *Groups: Theory and Experience.* Houghton Mifflin Co., Boston, 1973, p. 161.

GROUP DISCUSSION: WHAT IS A TRAINER?

THE ROLES OF THE TRAINER IN THE TRAINING PROCESS, A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to familiarize participants with the various roles performed by a trainer in the training process.

Description

You will work in four small groups to identify the various roles performed by the trainer in the training process. Each group will work on a different phase: either needs assessment, development, delivery, or evaluation. In your group, identify as many roles as you can and list them on newsprint. The roles for each phase will be discussed in the large group.

Comments

TAS ONE: INTRODUCTION TO NEEDS ASSESSMENT, AN INDIVIDUAL LEARNING ACTIVITY

Goal

This activity is the first in a series of learning activities designed to provide practice in identifying training needs, writing behavioral objectives, and designing and evaluating training. The goal of TAS ONE is to determine the steps a trainer should take when conducting a needs assessment.

Description

Read and complete Training Activity Sheet One. The answers will be discussed later in the module.

Comments

TRAINING ACTIVITY SHEET ONE: INTRODUCTION TO NEEDS ASSESSMENT

You have been requested to provide training for staff of the Second Chance Drug Treatment Program in Yourcity, Michigan. The program director seems excited about the prospect of staff training. You explained to him that the first phase of the training process is conducting a needs assessment to identify the specific training needs of his staff. He agreed to allow you to conduct the assessment. You will telephone him to discuss arrangements for conducting a needs assessment with staff at Second Chance.

List in sequence the steps you would follow when conducting a needs assessment. For each step, note any arrangements you would like the director to make.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

13.

NEEDS ASSESSMENT: OVERVIEW

Following is an outline of the lecture with space provided for notes.

I. Why Do We Assess Training Needs? (Johnson, 1967)

  A. Because the success of the organization requires that everyone perform at his optimum level

  B. To increase knowledge and skills; to explore attitudes that may be hindering staff members' effectiveness

  C. Because time, money, and effort can be wasted through training that is not based on valid present or emerging needs

  D. To determine whether training is an appropriate solution for the problem

II. Kinds of Training Needs (Johnson, 1967)

  A. Training needs may be categorized in terms of those that:

    1. Are felt by an individual
    2. Are indicated for a group
    3. Must be met immediately
    4. Can be met in the future
    5. Call for formal training activities
    6. Call for informal training activities
    7. Call for on-the-job instruction
    8. Call for off-the-job instruction
    9. The organization can meet best within itself
    10. The organization can meet best by using outside resources
    11. An individual can meet in concert with others

        12. An individual can meet only by himself

    B. A performance deficiency may be caused by several things

        1. Lack of knowledge or skill

        2. Lack of motivation

        3. Problems in the work environment

III. The Trainer-Consultant Role

    A. Data gathering

    B. Diagnosing

    C. Planning

DATA GATHERING*

To develop an effective training program, a trainer must have an accurate picture of people's training needs. A trainer may not deal with all of these needs, but he must know what they are in order to select those he will attempt to meet.

I. Look At The Whole Organization

When a trainer looks for training needs,he should develop an understanding of the organization as a whole, even if he expects to train only one or two groups. Groups and individuals seldom work alone. They are part of a network of interdependent relationships, business and personal. Training planned for one group may cause difficulties in the rest of the organization for the members of that group.

II. Look Beyond The Table of Organization

Knowing how an agency is organized is important, but knowing how that organization works is vital.

A. What are the *existing jobs and job groupings*?

B. What *relationships* are necessary for the organization to function effectively? Which ones need improvement?

   1. The organization and the community
   2. The organization and its board
   3. The organization and other agencies
   4. Different divisions, departments and work groups
   5. Supervisors and their subordinates
   6. People who work together as a group
   7. The organization and a labor union (if any)

C. How do different groups or individuals *communicate* within the organization? Does communication work well? If not, where and what are the problems?

D. How are *decision-making, policy setting, planning* accomplished now? Could the methods be improved? What are the problems? Do decision-makers know how to take a problem-solving approach?

E. What skills and knowledge are needed to meet *individual training needs?* What specific relationships with others need development? What are the development needs of individuals?

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*Most of this was adapted from New Jersey Community Action Training Institute. Community Action Training: A Handbook for Trainers. Trenton: New Jersey Community Action Training Institute, 1968.

F. What do members of the organization see as the *program objectives?* Is there a difference between the written program objectives, the program objectives as stated by the director, and the program objectives described by staff?

G. What are the *personal objectives* of the organization? How do staff members' personal objectives relate to the program objectives? The trainer should discuss these personal objectives with the staff members and obstacles to reaching them; this will serve as a basis for deciding what training would be most useful. The trainer may conclude that some training for everyone in the organization would have better results than training for just one group. (He will then have to decide whether to recommend this at first or wait until he has demonstrated the usefulness of training with one group.)

III. Ways of Gathering Information

A. Information can be gathered through talking with individuals.

B. A trainer can conduct group interviews to identify problems and to set goals and define problems.

C. He can observe the organization at work in staff meetings, in work groups, or by watching one employee--especially one whose decisions and work style affect many people in the organization.

D. Data can be collected by interviewing potential trainees and the supervisors and management officials responsible for the potential trainees' work.

E. Questionnaires can be developed and distributed.

F. The trainer can familiarize himself with job descriptions and performance standards, program reports, job objectives set by internal policy, and program objectives required by the funding source(s).

IV. Barriers to Getting Information

A. People react negatively to a trainer if they think he is judging their work.

B. People are too close to their own problems to see them.

C. People are reluctant to talk about their short comings. When there is competition some may feel that admitting their needs will cost them their jobs.

D. People see the trainer as an "outsider" who can't possibly understand *their* problems.

E. If the trainer is a staff member of the organization, people think, "What makes him know more than we do? He can't tell *us* anything."

F. The trainer's own desires and ideas make it hard for him to see what the problems and training needs really are and which are most important.

Often what a trainer defines as training needs are first seen as problems by him and by the treatment program. Problems and needs can sometimes be stated in identical terms, but usually a problem must be translated into a need. A staff member of a treatment program may know that he has a problem and what the problem is, but not how to say what he needs to solve the problem.

V. Steps in Data Collection

When conducting a needs assessment of a treatment program, you might want to follow these steps:

A. In an entrance interview with the program director, the trainer should discuss the history of the program and the director's expectations of the needs assessment and the training. The director and trainer should agree upon:

1. The trainer's role
2. What the trainer needs from program staff
3. The assessment procedures to be used
4. What training can and cannot do
5. What the trainer will give the director as a result of the needs assessment

B. The trainer should meet with the treatment program managers (and/or supervisors) to discuss purpose, goals, and plan for the assessment, time, etc.

C. He should meet with individual managers (and supervisors) about problems, concerns, training needs (theirs and their staffs).

D. Interviews should then be conducted with staff members (either individually or in groups).

E. The trainer should then review, arrange, and analyze the needs assessment data.

F. At the exit interview the trainer should reach an agreement with the sponsor on goals and resources.

GATHERING DATA FOR TRAINING NEEDS: NEED INDICATORS

STUDY

Plans

- past and projected changes in structure, personnel, or procedures
- goals, objectives, and organization

Employee Matters

- high turnover
- absenteeism
- tardiness
- grievances
- composition of supervisory force

Official Inspection Reports (if available)

- by administration
- HEW (Federal) reviews
- lecensing (Dept. of Health)

Work and Work Flow

- production/volume
- fluctuations in production
- reports on clients' satisfaction with service
- backlogs and where located
- records of waste, excessive errors, inefficiency

Supervisory Selection Policy

- qualification requirements
- experience and training of present supervisors

Management Audits (if available)

- by controlling department
- special surveys

Treatment Plans

- goals, tasks, and supportive services

GATHERING DATA FOR TRAINING NEEDS: NEED INDICATORS

OBSERVE

Morale Factors

- personal friction
- buckpassing
- complaints
- inattention to work
- leadership not held by appointed leader (the supervisors)
- lack of administrative (supervisory) support of workers
- authoritarian leadership
- absence of sense of purpose and accomplishment
- etc.

Communication Failures

- written and oral instructions misunderstood
- failure of information to flow up, down, and across
- inability to express, orally or in writing
- semantic difficulties

Job Knowledge

- technical phases
- administrative phases
- supervisory phases

Supervision

- assignment of work
- planning and scheduling
- instructing workers
- handling grievances
- lack of job pride
- lack of job interest
- poor coordination
- inadequate recognition
- failure to motivate

Job Application

- putting knowledge and skill to work
- will to improve, self-development

ANALYZING THE DATA

I. Analyzing the Data

A. To define specific needs and determine those that can be met through training

1. Categorize needs assessment data according to participants' current level of knowledge, skill, and attitude

2. Identify the level of knowledge, skill, or attitude that must be achieved to maintain performance improvement

B. The facts, feelings, opinions, and ideas garnered during the needs assessment can be categorized as follows

   1. People to be trained

      a. Knowledge

         1) *What do they know about their jobs?*

         2) *What do they need or want to know to help them do their jobs better?*

      b. Attitudes

         1) *In general, how do they feel about their work?*

         2) *How much do they want training?*

         3) *How committed do they seem to be to learning?*

         4) *How do they get along with each other?*

      c. Skills

         1) *What skills do they have?*

         2) *What skills do they need?*

   2. Their supervisors and/or higher management

      a. What do these people want or expect the trainees to learn in terms of knowledge, skills, or attitudes?

      b. How do they feel about the training?

c. What special abilities do you have (or must a trainer have) to conduct the prospective training?

II. Suggestions for Analyzing the Data

A. Others' perceptions

1. What do people say their needs and problems are?

2. Do they volunteer information about others?

3. What do they say other people's needs and problems are?

B. Your observations

1. What did you observe in terms of the organization as a whole, the existing jobs and job groupings, and workers' performance?

2. How do your observations compare with what people said about themselves?

3. What are the similarities and differences between your observations and what others reported?

4. What do you view as the most pressing training needs and why?

5. What do staff members in each category (counselors, supervisors, administrators) view as their most pressing needs?

6. What needs or problems cannot be remedied by training staff members in certain categores? Which categories?

7. Which of the needs or problems are due to unresolvable personality problems, insufficient funds, the

organizational structure, inadequate personnel or equipment, poorly structured work flow, etc.?

8. How much time is available for the training?

III. Suggestions for Defining Training Needs

A. State the problem as specifically as possible.

1. Problem: Counselors are supposed to help their clients obtain any welfare assistance for which they are eligible. However, counselors don't know the various programs administered by welfare or the eligibility requirements for each.

2. Problem: Counselors haven't obtained sufficient information from clients to develop adequate treatment plans within the allotted time.

B. Translate problem statement into a statement of need.

1. Example One

a.	Problem:	Counselors are supposed to help their clients obtain any welfare assistance for which they are eligible. However, counselors don't know the various programs administered by welfare or the eligibility requirements for each.
b.	Need:	Counselors need to learn the basic welfare laws and procedures that relate to their clients' eligibility for welfare.

2. Example Two

a.	Problem:	Counselors haven't obtained sufficient information from clients to develop adequate treatment plans within the allotted time.
b.	Need:	Counselors need to improve their ability to interview clients to obtain sufficient information for treatment planning.
c.	Non-Training Need:	Supervisors need to review the client assessment/treatment planning process to determine whether sufficient time

has been allotted for obtaining treatment planning information.

IV. Sponsor-Trainer Agreement on Goals and Resources

A. Present your list of needs to the sponsor of the training and to the prospective trainees. Revise it according to their suggestions so the list reflects their ideas as well as yours.

B. Give the administrators, supervisors, and trainees a clear idea of what training is, what it can do, and *what it can't do.* Encourage the agency managers and the trainees to describe their concept of training.

C. Find out the following:

1. The amount of time they will commit for the training
2. Where they prefer the training to take palce
3. What resources they will make available
4. What money is available for hiring consultants, renting special equipment, etc.

D. Reach a clear agreement on the general training goals and the commitments you and the sponsoring agency make about the training. (Example: Who will provide what, when, and where?) Put this agreement in writing.

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TAS TWO: TRANSLATING PROBLEMS INTO TRAINING NEEDS, AN INDIVIDUAL LEARNING ACTIVITY

Goal

This is the second in the series of individual learning activities. The goal of TAS TWO is to give participants practice in translating problem statements into training needs.

Description

Read and complete Training Activity Sheet Two for a discussion about determining training needs.

Comments

TRAINING ACTIVITY SHEET TWO: TRANSLATING PROBLEMS INTO TRAINING NEEDS

You have completed the needs assessment of the Second Chance Drug Treatment Program. You have discovered that a number of problems exist. These are explained below; translate each into training needs:

1. *Problem*

   Counselors have not been keeping complete records of their counseling sessions. Supervisors say that counselors have been told that all records must contain the following: the length of the session, date, brief summary of content, next scheduled interview, and any important outcomes (i.e., client sent to apply for vocational training).

   Training Need(s):

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TAS TWO: continued

2. *Problem:*

   Counselors feel that their needs and problems are not understood by supervisory staff. Supervisory staff feel that most counselors ignore supervision.

   Training Need(s):

3. *Problem:*

   Counselors have mentioned problems in obtaining necessary and accurate information from clients.

   Training Need(s):

TAS TWO: continued

4. *Problem:*

   Counselors feel that they are working very hard without receiving the support and recognition they need.

   Training Need(s):

5. *Problem:*

   Supervisory staff don't know how to establish performance standards and conduct personnel evaluations.

   Training Need(s):

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IN PROBLEM STATEMENTS 6-8 THE SECOND CHANCE DRUG TREATMENT PROGRAM IS ATTEMPTING TO OBTAIN J.C.A.H.* ACCREDITATION.

6. *Problem:*

Administrative staff has requested your help in preparing a written program review plan that includes the following:

A statement of short-term and long-term objectives and goals that are realistic and attainable--these must be clearly and operationally defined so that measures of the program's performance can be developed

A list of objectives that complement overall program goals must be prepared for each component

Written evaluation procedures that will allow the governing body and the staff members involved in planning and management to measure the progress being made in reaching the program's stated objectives and goals

Training Need(s):

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*Joint Commission on Accreditation of Hospitals

7. *Problem:*

While conducting the needs assessment you have discovered the following:

The director must write policy and procedures that establish a staff development program and that designate an individual to supervise these activities. This staff development program must include orientation for entry-level staff, on-the-job training, in-service education, and opportunities for continuing job-related education.

Second Chance must establish on-site training programs and/or enter into relationships with outside resources capable of meeting staff training needs.

The staff devleopment program must be constructed to ensure that staff members are kept informed of significant new developments in the field of drug abuse treatment and rehabilitation.

In addition, the director has told you that in-service training programs must be instituted whenever program operations or functions are changed, and must be designed to allow staff members to develop new skills so that they may effectively adapt to such changes. The staff development program should not only upgrade the knowledge and skills of staff members, but should also provide a means for staff members to develop skills that will make them eligible for promotion. On-site staff development activities should be planned and scheduled. These activities must be documented in order to evaluate their scope, effectiveness, attendance, and the amount of time spent in such efforts.

Suddenly it becomes quite clear to you why the program director was so eager to have you conduct a needs assessment!

Training Need(s):

8. *Problem:*

The Second Chance Drug Treatment Program does not have written job descriptions that include:

- Job title
- Tasks and responsibilities of the job
- The skills, knowledge, training, education, and experience required for the job
- The relationship of a given job to other jobs within the program
- The job path or career ladder
- The working conditions, location(s) of the job, and the materials and equipment to be used in the job

Training Need(s):

DEVELOPING TRAINING GOALS AND WRITING BEHAVIORAL OBJECTIVES

Following is a lecture outline with space for notes provided.

I. What Are Training Goals?

   A. Training goals are *general* statements of what the training should accomplish.

   B. They are derived from the training needs and are used to write specific behavioral objectives.

II. Writing a Goal Statement

   A. A goal statement relates the training program to the need and is descriptive of the training

   B. How to develop a goal statement:

Example One

PROBLEM

Counselors are supposed to help their clients obtain any welfare assistance for which they are eligible. However, counselors don't know the various programs administered by welfare or the eligibility requirements for each.

NEED

Counselors need to learn the basic welfare laws and procedures that relate to their clients' eligibility for welfare.

TRAINING GOAL

To improve counselors' knowledge of the eligibility criteria and procedures for welfare so that they can help their clients receive the funds to which they are entitled.

Example Two

PROBLEM

Counselors haven't obtained sufficient information from clients to develop adequate treatment plans within the allotted time.

NEED

Counselors need to improve their ability to interview clients to obtain sufficient information for treatment planning.

TRAINING GOAL

To improve counselors' interviewing skills so that they are able to obtain sufficient information for treatment planning from their clients within the time allotted.

III. What Is a Behavioral Objective?

A. A behavioral objective is a specific statement of the *change* in knowledge, skill, or attitude that the trainees will have after training.

B. A training program is constructed so that participants learn to accomplish the behavioral objectives.

IV. Writing a Behavioral Objective

A. A behavioral objective should be stated in terms of trainee performance and should be measurable.

B. It should include the following: the terminal behavior, the criteria, and the conditions.

1. Describing the terminal behavior

    a. Terminal behavior is the behavior you would like the trainee to exhibit at the end of training.

b. The trainer must determine what behavior(s) demonstrate that the training goal has been accomplished, for example:

If the goal is to improve counselors' knowledge of the eligibility requirements for the programs administered by welfare, which behaviors would demonstrate this knowledge?

Needs assessment data indicate that trainees do not know the programs administered by welfare, the eligibility conditions for each program, and the procedural steps involved.

If trainees are able to demonstrate knowledge of these things at the end of training, then the goal will have been accomplished.

Example:

At the end of the training session, trainees will be able to--

1. *identify* the different *programs administered by welfare* for which their clients are potentially eligible;
2. *identify conditions* applicants must meet *to be eligible* for welfare assistance; and
3. *identify the procedural steps* a potential client must follow *to receive welfare assistance.*

2. Deciding the minimum level of achievement: the criteria

a. The trainee needs to know how well (to what degree of proficiency) he should be able to accomplish the terminal behavior.

b. The trainer must determine how many correct responses or what standard of performance he will expect.

Example:

At the end of the training session, the trainees will be able to--

identify at least three programs **administered by welfare for which their clients are potentially eligible.**

3. Deciding the conditions under which performance will be demonstrated.

   a. The trainer needs to describe the conditions under which the trainee will demonstrate the terminal behavior.

   b. Some examples are:

      1) Given a list of . . .

      2) Given any reference of the learner's choice . . .

      3) Given a properly functioning . . .

      4) Without the aid of references . . .

Example:

At the end of the training, and ***without the aid of notes,*** **the trainees will be able to--**

identify in writing **at least three programs administered by welfare for which their clients are potentially eligible.**

C. A behavioral objective that reflects the content of this module might be the following:

Upon completion of Module III, and without the aid of notes, the trainee will be able to select from a list of six behavioral objectives those that state the terminal behavior, the minimum level of achievement, and the conditions under which the performance will be demonstrated. An acceptable level of performance will be five correct answers out of six. The exercise must be completed in ten minutes.

Example:

PROBLEM

Counselors are supposed to help their clients obtain any welfare assistance for which they are eligible. However, counselors don't know the various programs administered by welfare or the eligibility requirements for each.

NEED

Counselors need to learn the basic welfare laws and procedures that relate to their clients' eligibility for welfare.

TRAINING GOAL

To improve counselors' knowledge of the eligibility criteria and procedures for welfare so that they can help their clients receive the funds to which they are entitled.

BEHAVIORAL OBJECTIVES

At the end of the training session, and without the aid of notes, trainees will be able to--

1. identify at least three programs administered by welfare for which their clients are potentially eligible;
2. identify at least three conditions applicants must meet to be eligible for each program administered by welfare; and
3. identify at least four procedural steps a potential client must follow to receive welfare assistance.

D. Seven guidelines for writing objectives

1. Is it clear?

2. Is it relevant?

3. Can the trainees accomplish it?

4. Does it improve performance?

5. Is it measurable?

6. What information do you have that shows that these trainees need to achieve this objective?

7. Does it state the terminal behavior, the criteria, and the conditions?

VERBS FOR WRITING GOALS AND OBJECTIVES *

Some words are appropriate for writing learning goals. They are general rather than specific. Some of these are:

- to know
- to learn
- to develop
- to understand
- to appreciate
- to know relevant ways
- to increase
- to improve
- to know how

Other words are much more specific, and are appropriate to describing terminal behavior(s) when writing behavioral objectives. Some of these are:

- to list
- to identify
- to name
- to classify
- to diagram
- to write
- to display
- to compare
- to quote
- to match
- to explain
- to solve
- to place
- to state
- to select
- to order (in a given sequence)
- to translate
- to demonstrate

---

*Adapted from Margolis

BEHAVIORAL OBJECTIVE FORM

Problem
Need
Goal
Specific Objective(s)

SAMPLE OBJECTIVES

INSTRUCTIONS:

- Circle the *terminal behavior*
- Underline the *criteria* with one line
- Underline the *conditions* with two lines

SAMPLE OBJECTIVES

At the end of the training session, and without the aid of notes, the trainees will be able to:

- After observing a role play, identify in writing at least five feedback rules.

- Identify and list at least four steps in the planning process.

SAMPLE OBJECTIVES: continued

- Given either an audiotaped vignette or a transcript of an interview, identify at least three effective interviewer responses that meet the criteria described in the Interviewing Skills module.

- In a simulated interview, demonstrate at least three interviewing techniques that are consistent with the principles taught in the Interviewing Skills module.

TAS THREE: FORMULATING TRAINING GOALS AND BEHAVIORAL OBJECTIVES, AN INDIVIDUAL LEARNING EXPERIENCE AND SMALL GROUP DISCUSSION

Goal

The goal of TAS THREE is to learn how to develop training goals and behavioral objectives.

Description

Read and complete Training Activity Sheet Three. Then discuss your answers in your small groups.

Comments

TRAINING ACTIVITY SHEET THREE: FORMULATING TRAINING GOALS AND BEHAVIORAL OBJECTIVES

In your assessment of the Second Chance Drug Treatment Program you discovered several problems that you then translated into training needs. For each of the problems listed below, write a training need. Then write a training goal to meet that need and at least one behavioral objective to fully or partially accomplish the goal.

Problem:

Counselors have not been keeping complete records of their counseling sessions. Supervisors say that counselors have been told the requirements for complete records.

Training Need:

Training Goal:

Behavioral Objective(s):

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TAS THREE: continued

Problem:

Supervisory staff members don't know how to establish performance standards and conduct personnel evaluations.

Training Need:

Training Goal:

Behavioral Objective(s):

Problem:

The Second Chance Drug Treatment Program does not have written job descriptions.

Training Need:

Training Goal:

Behavioral Objective(s):

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Do the training goals:

- Relate to the need?
- Describe the training?

Do the behavioral objectives:

- State terminal behavior?
- State minimum levels of achievement (criteria)?
- State conditions under which the terminal behavior will be demonstrated?

SUMMARY OF MODULE III AND READING ASSIGNMENT

Use space below for any notes.

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JOB DESCRIPTION FOR GENERAL TRAINER

Developed at the National Center for Alcohol Education, Rosslyn, Virginia 22209. April, 1974.

JOB DESCRIPTION FOR GENERAL TRAINER

A. Definition of Training

Training is an organized instructional activity, designed to produce specific learning for improving job performance.

B. Overview of Trainer Functions

In the areas of planning and design, the trainer requires skills having to do with the analysis of training requirements, needs survey, scheduling, content analysis, curriculum design, analysis of methods and material, and evaluation. *In the area of delivery skills,* he needs an awareness of self and others, knowledge of group dynamics, communications, and a grasp of the information and skills of the subject area being presented.

C. Task List

1. Front End Analysis

A trainer should be able to:

a. identify the problems of the organization, field or job;

b. determine if the problems are knowledge and skill, environmental or organizational, motivational or incentive;--identify those subject to training solution;

c. analyze job function for training needs;

d. describe mastery performance of job or function;

e. devise selection criteria - entry level;

f. devise recruitment system - design application form;

g. design needs assessment techniques, or instruments;

h. analyze needs assessment results for objective and design implications;

i. estimate nature of training input needed: length, general approach, priorities:

j. other.

2. Design Skills

A trainer should be able to:

a. develop goals, consistent with the identified problem or training need as identified by needs assessment, the mastery description, and the learner characteristics;

b. develop objectives, consistent with goals, which are measurable, specific as to conditions of performance, acceptable levels of performance, and which are feasible for target population and conditions (time, facilities, staff, materials, etc.);

c. design a training program, consistent with objectives, which makes provision for establishing the learning climate, achieving agreement on goals, objectives and evaluation. Specific learning activities should maximize the learners' feelings of self-direction, offer the opportunity for active involvement and experience, and make use of the learners' knowledge and skills;

d. review the training program by verifying content with more than one person, require feedback on activities and total design from more than one particular trainer, and consult with evaluation specialist;

e. prepare the training program by:

(1) previewing all films and other prepared materials;

(2) checking function of all audio-visual equipment;

(3) devising a system for participants to organize and store handouts;

(4) briefing all outside speakers at least twice, preparing clear and detailed guidelines for their role;

(5) other.

3. Delivery Skills

A trainer should be able to:

a. internalize goals and objectives and maintain focus on them throughout training;

b. communicate these to the learner, and engage his participation in achieving them;

c. receive feedback from the learners, and relate and adjust this to ongoing goals and objectives;

d. be sensitive to, and respectful of, individual needs, learning pace, and contributions;

e. be sensitive to individual feelings, and communicate recognition of them;

f. be sensitive to his own projection, and his own feelings;

g. be sensitive to group forces and direct these toward the achievement of the goals and objectives;

h. function as a training team member, able to rotate leadership as appropriate to ongoing needs in accordance with program goals and objectives;

i. possess a mastery of content;

j. possess a belief that the content can be learned, and is worth learning;

k. other.

4. Evaluation

A trainer should be able to:

a. build into a design mechanisms for finding out if objectives have been achieved;

b. devise simple tests, quizzes, or situations for the learner to validate his learning;

c. devise means of getting feedback to validate personal effectiveness;

d. observe and analyze effectiveness of other team members, and provide objective and constructive feedback for them to validate their personal effectiveness;

e. elicit learner feedback regarding program design;

f. analyze data collected and adapt and adjust to future design;

g. know the limitations and partiality of evaluation designs, decide the most appropriate in view of training goals and objectives, and acknowledge and respect the immeasurables;

h. other.

SAMPLE DESCRIPTION OF THE RESPONSIBILITIES OF THE TRAINING COORDINATOR

SAMPLE DESCRIPTION OF

THE RESPONSIBILITIES OF THE TRAINING COORDINATOR

1. Develop, revise, and maintain a *training plan* to develop capability and competency, and provide resident participation to accomplish the agency goals and objectives.

2. Develop, maintain, and chair a *training committee* to determine the training needs of the agency. This committee should include representation from all departments, representatives of the poor, and training representatives of other agencies and/or educational institutions.

3. Serve as the *coordinator of all training*, orientation, education, and career development activities of the agency.

4. *Stimulate and initiate new training* programs for employees, board members, volunteers, and resident participants.

5. *Coordinate all major meetings*, conferences, seminars, etc.

6. *Serve as advisor* to the director, department heads, supervisors, etc., in the areas of training, education, career development and communication media.

7. *Develop and maintain interagency, college and university liaison* in training, education, and career development in order to --

   be informed of all available training and education programs, especially in the field of drug abuse treatment and prevention; and

   promote and initiate interagency, college, and university co-sponsored programs to utilize more effectively all available training and education facilities and resources.

8. *Develop and maintain a current list of training programs available.*

9. *Evaluate the effectiveness* of all training activities and programs.

10. *Plan, develop, and select personnel to conduct* intra-agency training, orientation, and career development programs, etc.

11. *Develop and conduct regular orientation programs,* with visuals, for the agency employees, board members, other

agencies, organizations, groups, etc., after gaining a thorough knowledge of the agency goals, objectives, functions, and programs.

12. *Coordinate* training, orientation, and career development programs.

SAMPLE GUIDE
FOR
COURSE ADMINISTRATORS

SAMPLE GUIDE
FOR
COURSE ADMINISTRATORS

Effective Training is the cumulative result of extensive planning, organizing, developing, and coordinating numerous segments into a cohesive program. Training should have continuity; effective training should provoke interest as more is learned.

What is a "course administrator?" He is a competent planner and organizer of the elements necessary in course preparation. He should develop his proficiency as a speaker and trainer in order to evaluate the effectiveness of other speakers and to be capable of making recommendations for their improvement. Finally, a course administrator should be a course coordinator, sensitive to trainer and participant needs, alert to course mishaps, disruptions and delays, and capable of assuming responsibility for the continuity and effectiveness of a course.

Below is an outline for course administrators to follow in planning and arranging courses.

OUTLINE
FOR
COURSE ADMINISTRATORS

I. INITIAL PLANNING AND ARRANGEMENTS FOR COURSE

A. Audience

Determine number of participants

B. Date

Avoid conflict with other meetings involving audience

C. Location

1. Must be accessible for participants
2. Must have adequate meeting room facility
3. Consider lodging, meals and coffee facilities

D. Agenda

1. Review proposed agenda
2. Recommend possible additions and deletions on agenda

E. Consultants

   1. Should have knowledge of subject
   2. Should have speaking and training ability, including use of visual aids

F. Printing

   1. Prepare announcements of course
   2. Training facilities should furnish Instructor's Manuals, including lectures, outlines, reference material, and visual aids
   3. Training facilities should furnish Participant's Manuals, including outlines of lectures, workshop problems, reference material, etc.

II. MEETING FACILITY

A. Adequate lighting for writing, and a means of dimming lights

B. Proper heating, ventilation, and air conditioning

C. Comfortable seating for participants

D. Tables and chairs arranged so as to permit participants to write

E. Audio-visual equipment operator

III. TRAINING AID MATERIAL

A. Basic Equipment

   1. Screen (minimum 4' X 4' and preferably capable of being tilted)
   2. Blackboard, with chalk and erasers
   3. Flip chart, with wax pencils and marker
   4. Overhead projector (400-500 watt and preferably with roller attachment for acetate paper), spare bulb, and marking pencils
   5. Slide projector (2' X 2')
   6. Videotape equipment

B. Meeting Room Supplies

   1. Paper, pencils, and ashtrays
   2. Coat racks
   3. Name tags

C. Optional Equipment (Not required for all courses)

    1. Film projector (16mm)
    2. Opaque projector
    3. Slide projector (3¼" X 4")
    4. Portable table for projection equipment

IV. COURSE ANNOUNCEMENTS

A. Name, date, location, and co-sponsors of course

B. Audience for whom course was designed

C. Purpose and objectives of course

D. Subject to be presented

E. General information (cost, etc.)

F. Return addressed registration card

V. ACKNOWLEDGEMENT LETTER TO PARTICIPANTS: CONTENTS

A. Acceptance to the course

B. Information about lodging, meals, transportation, etc.

C. Local coordinator's name, address, and telephone number

D. Additional information

VI. ACKNOWLEDGEMENT LETTER TO CONSULTANTS: CONTENTS

A. Confirmation of his/her assignment

    1. Should state course name, dates, and location
    2. Should state subject, area, time allocated, and total course agenda

B. Visual aids needed in presentation

C. Financial arrangements (if any)

D. Prepared presentation, visual aids, etc. being forwarded

E. Advocate "trial runs" utilizing visual aids in the presentation

VII. PRINTED PROGRAM: CONTENTS

A. Name, date, location, and co-sponsors of course

B. Audience for whom course was designed

C. Purpose and objectives of course

D. Total agenda, including topics, consultants, coffee and lunch breaks, question periods, etc.

E. Consultants' names, positions, and addresses

VIII. VISUAL AID EQUIPMENT

A. Order or obtain necessary visual aid equipment well in advance of course

B. Position equipment, checking to see if it is operating satisfactorily

SAMPLE NEEDS ASSESSMENT
QUESTIONNAIRE

* A.R. Bauman, Inservice Education Manual for Long-term Care Facilities in South Carolina, March 1974.

SAMPLE NEEDS ASSESSMENT QUESTIONNAIRE

NAME: ______________________________

(optional -- you may want this to be filled out anonymously for greater honesty)

JOB TITLE: ______________________________

The purpose of this questionnaire is to help plan a training program that meets your actual needs. Please make every effort to answer each question in your own words. Try to avoid "yes" or "no" answers as much as you can. The more information you can give us, the better we can plan the training program. Everything you write here will be kept confidential. No one besides the training staff will see this questionnaire.

1. *In your own words*, describe the overall purpose of the unit you work for:

2. If this is the overall purpose of your unit, how does your job carry out this purpose? *(Please take a few minutes to think about this before writing your answer.)*

3. What do you do on your job? List the duties you usually perform during a typical week:

4. List also any duties you may be called on to perform only occasionally, or once in a while:

5. What parts of your job do you find most satisfying?

6. What parts of your job do you find most difficult?

7. *Please complete the following:*

If I knew more about:

a.

b.

c.

I would be able to do my job better.

8. In order to do your job well, what must you depend on other people to do well?

9. Are you satisfied with the way you are supervised? If not, how could it be improved? *(Please remember we are interested only in information that will help to plan training.)*

10. How well do you think people on the staff communicate with each other? *(Please check the answer you think fits and comment briefly.)*

( ) People communicate very well, there's no need for much improvement.

( ) People communicate fairly well, but could improve: *(comment)*

( ) People communicate poorly, improvement is needed:

( ) It makes no difference. People on our staff don't need to communicate much with each other.

11. What, more than anything else, would you like to learn from the training program being planned?

SAMPLE NEEDS ASSESSMENT INTERVIEW QUESTIONS

NEW EMPLOYEE

For talking individually with new employees before training

1. How would you describe your job, as you understand it? What exactly are you supposed to do on a typical day?
2. What do you think you'll like most about it? Least?
3. What do you think will be most difficult to learn about it? Why?
4. What do you think will be the easiest to learn? Why?
5. What do you hope you'll accomplish for yourself through this job?
6. What seems most interesting to you about the job? Least interesting?
7. What experiences have you had that might in some way help you now on this job?
8. What experience do you wish you'd had? Why?
9. What kind of clients do you think you might have trouble working with?

The specific treatment program's location, operation, history, etc., will suggest additional questions for such interviews.

SAMPLE ASSESSMENT INTERVIEW QUESTIONS

EXPERIENCED WORKER

Possible questions to use in individual interviews to assess the training needs of experienced workers

1. Describe your job--what do you do?
2. What do you think the agency goals are?
3. What do you want to accomplish with this job?
4. What things do you like to do best?
5. What things would you like to do better?
6. Who do you go to for help?
7. What life or work experience have you had in the past?
8. What do you think your clients think you need to do better?
9. How do you think your supervisor sees you?
10. What kinds of things would help you do your job better?
11. Does the job fulfill the expectations you had when you first took it?

The specific treatment program's location, operation, history, etc., will suggest additional questions for such interviews.

STATEMENTS OF OBJECTIVES WITHIN THE THREE DOMAINS

*Adapted from Veri, Clive C. and Haar, Vonder T.A. *Training the Trainer*. St. Louis: Extension Division, U. of Missouri

STATEMENTS OF OBJECTIVES WITHIN THE THREE DOMAINS

Statements of objectives fall within one of three domains: cognitive, affective, and psychomotor. At a simple level, these domains are best remembered by referring to them as knowledge (cognitive), attitudes (affective), and skills (psychomotor).

COGNITIVE OBJECTIVES

Cognitive objectives emphasize remembering facts, figures, methods, operating procedures, policies; recalling something that has been learned; or solving some intellectual task for which the trainee has to determine the essential problem and reorder the information or combine it with previously acquired knowledge. A hierarchy of classes within the cognitive domain has been established on a continuum from simple to complex (Bloom, 1956).

Briefly, a trainee must do the following in order to reach the state of autonomy.

- A trainee acquires *knowledge* or information.
- He then *comprehends* or understands the knowledge he has gained.
- He *applies* or uses the information gained and understood.
- Then he *analyzes* the information by breaking it into component parts and considering the relationship of the parts.
- The trainee *synthesizes* or combines several pieces of knowledge to arrive at additional information not clearly known before.
- Then he *evaluates* the information gained, using criteria or standards that reveal the extent to which the information is accurate, methods are effective, policies are reasonable, etc.

An example of a cognitive objective would be as follows:

> Given an organizational chart of his department, by the end of training a trainee will be able to identify his immediate superior as well as the relationship of his superior to the general department head and to the person responsible for the overall operation of the organization.

Another example:

> Presented with an employee handbook, the trainee will be able to determine the number of days of sick leave for which he is eligible after six months of employment.

AFFECTIVE OBJECTIVES

Affective objectives emphasize attitudes, beliefs, values, appreciations, and interests, the intensity of which varies from simple attention to something that is happening to complex qualities of character or conscience. Like cognitive objectives, affective objectives are arranged in a hierarchy from simple to complex (Krathwohl, Bloom, and Masia, 1964).

- A trainee *receives*, recognizes, or notices something. He develops an awareness of people and things around him, appreciates differences in individuals, becomes alert to the needs of others.

- A trainee *responds* to what he receives. He complies with regulations, accepts responsibility for himself and his actions, takes pleasure in his job, enjoys self-expression.

- He shows preference for selected activities, *values* some over others. He sees concepts as having worth.

- He then *organizes* a value system. He essentially combines several complex (and often disparate) values into an ordered relationship with one another.

- At the highest level of internalization, a trainee is *characterized by a value system*. The attitude, belief, or interest is so much a part of the trainee that he has built an internally consistent value system, and his behavior can be predicted.

An example of a behavioral objective in the affective domain would be as follows:

> Given that the trainee believes in the safety standards of his job, he wears a hard hat, safety glasses, and steel-toed safety shoes.

Another example:

> After supervisory training, the trainee will have a basic feeling of respect for the worth and dignity of his subordinates.

PSYCHOMOTOR OBJECTIVES

Psychomotor objectives emphasize some motor or muscular skill, some manipulation of material and objects, or an act that requires neuromuscular coordination. Driving a car, operating a movie projector, and typing are examples of psychomotor skills--all requiring the application of knowledge and attitudes through muscle coordination of the body.

Like objectives in the cognitive and affective domains, psychomotor objectives have been ordered into classes, and, as with the first two domains, are ordered on a hierarchy from simple to complex (Simpson, 1967).

- *Perception* is the first step in performing an act. The trainee becomes aware of objects, qualities, or relations by way of the sense organs. Perception can be broken down into sensory stimulation, cue selection, and translation.

- When the trainee is *set* he has developed a readiness to undertake an action or experience. He develops a mental set, physical set, and emotional set.

- In the *guided response* the trainee develops abilities that are needed for a complex skill. He responds under the trainer's guidance through imitation and trial and error.

- The trainee's learned response becomes *mechanical*, habitual.

- In *complex overt response* the trainee has attained a high degree of skill. He moves from a resolution of uncertainty to automatic performance.

- The trainee is flexible, and can *adapt* activities to meet the demands of new problems.

- The trainee *originates* new ways of manipulating materials as a result of understanding, abilities, and skills developed in the psychomotor area.

Examples of behavioral objectives in the psychomotor domain would include the following:

> Given a typewriter with a standard keyboard, a trainee will be able to retype a document of the agency at 40 words per minute with two errors, the errors being correctable with "Snopake."
>
> Given appropriate instruments, a trainee will be capable of drawing a 3 cc. blood sample from the vein in a patient's arm within a three minute time period.

It can be seen in these examples that a trainee must have previously acquired certain cognitive (knowledge) and affective (attitudes) behavior before he can adequately perform a psychomotor objective. It becomes obvious that the stating of objectives is a highly complex matter. Objectives must be carefully thought through and committed to paper by the trainer before any training can be conducted. With carefully developed objectives, training will be more systematic and logical, and better able to change a trainee's behavior with the least amount of time and expense.

Here are some questions that a trainer can ask himself about his objectives as a guide to identifying important aspects of the terminal behaviors that he wishes to develop:

- *What will the learner be provided?*

- *What will the learner be denied?*

- *What are the conditions under which you will expect the terminal behavior to occur?*

- *Are there any skills that you are specifically not trying to develop? Does the objective exclude such skills?*

ACTION VERBS ASSOCIATED WITH THE COGNITIVE DOMAIN *

SIMPLE → COMPLEX

KNOWLEDGE	COMPREHENSION	APPLICATION	ANALYSIS	SYNTHESIS	EVALUATION
define	identify	predict	analyze	combine	judge
state	justify	select	identify	restate	evaluate
list	select	assess	conclude	summarize	determine
name	indicate	explain	differentiate	precise	recognize
write	illustrate	choose	select	argue	support
recall	represent	find	separate	discuss	defend
recognize	name	show	compare	organize	attack
label	formulate	demonstrate	contrast	derive	criticize
underline	explain	construct	justify	select	identify
select	judge	compute	resolve	relate	avoid
reproduce	contrast	use	break down	generalize	select
measure	classify	perform	criticize	conclude	choose

ACTION VERBS ASSOCIATED WITH THE AFFECTIVE DOMAIN

SIMPLE → COMPLEX

RECEIVING	RESPONDING	VALUE	CONCEPTUALIZATION	CHARACTERIZATION
listen	state	accept	organize	revise
attend	answer	recognize	judge	change
prefer	complete	participate	relate	face
accept	select	increase	find	accept
receive	list	develop	determine	judge
perceive	write	attain	correlate	develop
be aware	record	indicate	associate	demonstrate
favor	develop	decide	form	identify
select	derive	influence	select	decide

*Instructional Design Workshop, U.S. Civil Service Commission, Washington, D.C.

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MODULE IV:

DESIGNING TRAINING ACTIVITIES

MODULE IV: DESIGNING TRAINING ACTIVITIES

PERSPECTIVE

The purpose of this module is to provide information on and to give participants practice in selecting appropriate curricula and designing training sessions. Participants receive guided practice in identifying learning tasks, selecting and sequencing curriculum, and selecting appropriate training methods, techniques, and materials. This module includes:

- Overview of Module IV
- Lecture/Discussion: Developing Curricula
- Structured Experience: TAS Four, Mix and Match, An Experience in Selecting Curriculum
- Lecture/Discussion: Training Design
- Structured Experience: TAS Five, Selecting Training Methods
- Summary

BEHAVIORAL OBJECTIVES

Using the information in Module IV as criteria, at the end of this module, and without the aid of notes, participants will be able to:

1. Define the following terms:

   curriculum
   the E-I-A-G process
   learning tasks

2. Given a behavioral objective, identify at least three learning tasks that can be derived from that objective
3. Given a behavioral objective, select at least three appropriate curriculum descriptions
4. Identify at least three steps in creating a training design
5. Identify at least four methods for communicating information in a training session

6. Identify at least one method of changing attitudes in a training session

7. Identify at least three methods of improving participants' behavioral skills in a training session

8. Given a behavioral objective and the learning tasks derived from that objective, select at least three training methods to accomplish the objective

MODULE IV: DESIGNING TRAINING ACTIVITIES

OVERVIEW

DEVELOPING CURRICULA

Following is an outline of the lecture with space for notes provided.

I. Selecting the Content: Developing Learning Tasks

   A. Questions a trainer must ask himself

      1. What must the trainee know to accomplish the behavioral objectives?

      2. What kinds of knowledge, attitudes, and skills must the trainee master?

      3. What learning tasks will best impart this knowledge, shape these attitudes, or give practice in these skills?

   B. How to derive learning tasks

      1. The learning task may be the same as the performance specified in the behavioral objective

Example One

Objective: At the end of the training, and without the aid of notes, the trainee will be able to identify at least three classifications of drugs subject to abuse

Learning Task: To learn the names of the four classifications of drugs that are subject to abuse

2. In most cases many learning tasks are derived from one objective

Example Two

Objective: At the end of the training, and without the aid of notes, the trainees will be able to identify at least four items of information (obtained during an assessment interview) that are used to determine client readiness for treatment

Learning Tasks:

1. To learn what an assessment interview is
2. To learn the categories of information to be obtained during an assessment interview
3. To learn the definition of and rationale for Category I of the assessment interview, Client Readiness
4. To learn what information is necessary to determine client readiness

C. How to select content

    1. Generate a list of learning tasks; this is the focal point for selecting content

    2. Consider the specific characteristics of the learning group and the individual differences among learners

II. Organizing the Content

A. Two bases for determining sequence

    1. Logical progression: from first step to second, and then to third step

    2. Type of learning presented by each task: a change in knowledge, attitude, or skills

SAMPLE OBJECTIVES

At the end of the training session, and without the aid of notes, the trainees will be able to:

1. After observing a role play, identify in writing at least four feedback rules that were demonstrated in the role play

   The learning tasks for this objective are:

2. Identify and list at least four steps in the planning process

   The learning tasks for this objective are:

(continued)

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3. Given either an audiotaped vignette or a transcript of an interview, identify at least three effective* interviewer responses that meet the criteria described in the Interviewing Skills module
(* as defined in AITP)

The learning tasks for this objective are:

4. In a simulated interview, demonstrate at least three interviewing techniques that are consistent with the principles taught in the Interviewing Skills module

The learning tasks for this objective are:

TAS FOUR: MIX AND MATCH, A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to provide practice in developing learning tasks and selecting appropriate curriculum

Description

There are two parts to this structured experience. In Part One teams match behavioral objectives and learning tasks with curriculum samples. In Part Two, each team discusses the rationale for their selections with the total group.

Comments

TRAINING ACTIVITY SHEET FOUR: MIX AND MATCH, AN EXPERIENCE IN SELECTING CURRICULUM

Behavioral Objective:

At the end of the training, and without the aid of notes, each participant will be able to:

Write a job description for his job that includes:

- Job title
- Tasks and responsibilities of the job
- The skills, knowledge, training, education, and experience required for the job
- The relationship of a given job to other jobs within the program
- The job path or career ladder
- The working conditions, location(s) of the job, and the materials and equipment to be used in the job

Learning Tasks:

TAS FOUR continued

Core Curriculum:

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TAS FOUR continued

Behavioral Objective:

At the end of the training session, and without the aid of notes, the participants will:

Write a plan to improve communication between supervisory staff and counselors. The plan must include:

- A statement of the problem
- Measurable goals
- Responsibilities of counselors to supervisors
- Responsibilities of supervisors to counselors
- A description of how the plan will be evaluated and revised

Learning Tasks:

TAS FOUR continued

Core Curriculum:

CORE CURRICULA

I. CLARIFYING THE ADMINISTRATIVE STAFF'S ROLE

I. A. Each participant is requested to prepare a description of his job-related duties and responsibilities. Work groups composed of senior level staff will compare job descriptions and discuss their perceptions of their roles, responsibilities, and functions to develop improved job descriptions.

I. B. In the second part of the session discussion will focus on the expanded role of senior level staff as staff developers, technical resource counselors, observer/evaluators, negotiators and mediators. Through exercises and discussion, staff relationships and policy-administration situations will be explored.

II. MANAGERIAL STYLE

II. A. The goal of this session is to provide greater understanding of one's own managerial style. Based on his own experiences and beliefs, each participant will be asked to write down the traits that would describe an excellent, average, and poor administrator. Each participant is then asked to list traits that describe himself as a manager.

II. B. Blake and Mouton's Managerial Grid will be discussed. Each participant will compare his managerial self-portrait with the scale of management styles described on the Grid. Discussion will focus on managerial styles, ranging from those that are primarily production oriented to those that focus primarily on human relationships.

III. EMPLOYEE DEVELOPMENT

III. A. One of the basic differences between employee development and other management training can be summed up in the words "long-range planning."

1. The four basic elements of long-range employee development

   are not always described in the same terms, and are often combined into fewer or expanded into more steps. The basic elements are as follows:

   a. Organizational analysis

   b. Personnel inventory and performance appraisal

c. Determining training or development needs

d. Planned development

2. This session will develop around the following nine principles of growth within an organization:

   a. Development is a highly individual matter and cannot be an assembly-line process.

   b. Every man's development is self-development. The desire, responsibility, and the effort rest with the man himself. The agency cannot develop him; it can only provide the opportunity.

   c. Development is primarily the result of daily work experience.

   d. Development cannot be based on specified personality traits.

   e. Opportunity for development must be universal.

   f. Primary emphasis must be placed on development in the present job rather than one that may later be gained through promotion.

   g. Managing is a profession.

   h. Decentralized decision making is essential to development.

   i. Development is the undelegable responsibility of line management.

III. B. Any employee development program must be tailor-made to fit the needs of staff. The principles and concepts expressed here are guides and should not be considered inflexible. These should be modified according to the operating conditions and philosophy of the agency.

III. C. Procedures will be contingent on an organization's number and average age of personnel; complexity, depth, and flexibility; geographic area; span of control; and age of program. The session should employ techniques such as management games, job rotation, guided experience or coaching, multiple management, workshops and seminars, and the syndicated system.

III. D. It is very important that attitudes toward training, centralized autonomy, transfers and promotions, line and staff relationships, responsibility for personnel selection, and the overall framework of the agency be taken into consideration before delivering this session.

IV. COMMUNICATION SKILLS

IV. A. The content of this portion of the curriculum focuses on the problems of communications at various staff levels. The training will focus on the barriers to effective communication. Participants will have an opportunity to experience simulations and other practical exercises designed to enable the group to explore and analyze common experiences.

IV. B. Group communication problems, especially destructive behaviors that hamper group progress, will be studied.

IV. C. Intra-agency communications problems, as they occur in staff meetings and supervisory relationships, also will be discussed.

V. HUMAN SERVICES MANAGEMENT

V. A. This section will cover a broad range of interrelated subjects. A major focus will be on a systems approach to manpower utilization, one that covers not only the purpose and goals of an organization, but also the goals of its program components (subsystems). This session will cover:

1. The constraints under which goals must be pursued and the objectives appropriate to a given organization
2. The technologies or procedures (in general) used by the organization to execute subsystem goals
3. Work that must be done and what workers do

4. Task descriptions

5. The range of functions performed by workers in specific jobs

6. Worker qualifications, such as reasonong ability and proficiency in language and math, that are associated with different kinds of job functions

7. Qualitative and quantitative performance for various tasks (knowing where and how to get relevant information)

8. The principles of job design to organize tasks into jobs

9. The principles of job design for career systems with an indication of appropriate supervision of performance standards and training and education

V. B. This session is designed for human services supervisors and administrative staff. The content of the session presents a set of concepts essential for management to operate more effectively. This training attempts to build upon management staff's experience and improve their skills.

VI. SENSITIVITY TRAINING

VI. A. This session will examine and explore the dynamics of the helping relationship between individuals and in groups.

VI. B. The trainees will be asked to write brief statements describing their feelings and reactions in a situation in which someone has offered them help. Using these statements, the trainer explores with the group the "hows" and "whys" of helping relationships.

VI. C. In a sensitivity group setting, the second part of this session focuses on analyzing how groups are formed, how "norms" are established, the roles people assume in a group, and how these roles affect group behavior and productivity.

VII. THE PROGRAM DIRECTOR AS STAFF SUPERVISOR

Six sessions are devoted to upgrading administrative skills.

VII. A. Recruitment and Selection II: Group and Individual Interviews: Group interviewing is introduced as a method of handling a large number of applicants and determining the candidates' communicative skills in a group setting. The trainer assumes the role of group interviewer, with several trainees acting as job applicants. Then, in a simulated group interview, several trainees assume the role of the interviewer. The various simulations are discussed by the total group. The principles of individual interviewing are outlined.

These become the basis for a series of role plays of an employment interview.

VII. B. Employee Evaluation I

In a guided group discussion participants will review the basic principles, the objectives of employee evaluation, types of ratings, and approaches. Participants will review several evaluation forms and guidelines for an effective employee evaluation conference. Information on how to structure the evaluation conference will be distributed.

VII. C. Employee Evaluation II

In a series of role plays about employee evaluation, participants will apply what they have learned. These practice sessions will provide an opportunity for all participants to assume the roles of supervisor and employee, utilizing the skills they have learned.

VII. D. Improving Internal Communication

In this session devoted to improving communications skills, formal and informal methods of "up/down/sideways" communications within an organization are demonstrated. Barriers to communications and a list of techniques for improving communications will be explored. Also, discussion will focus on how to improve communications between the central administration and program components.

Case situations about problems in the flow of communication will be examined, including when to use written, verbal, and other types of administrative orders. Each participant will utilize a self-evaluation checklist to review his ability to communicate and his communication style.

VII. E. Problem Clinic in Handling Grievances

A brief presentation of procedures for handling employees' grievances and determining causes of those grievances will lead to role-playing of typical employee complaints. Observers and participants will critically evaluate the results. Problem situations that may be simulated include resistance to staff reassignment,

complaints about work loads, exceeding authority, and earnings not commensurate with job responsibility.

VIII. THE DIRECTOR AS STAFF DEVELOPER

VIII. A. Work groups are assigned the task of inventorying the knowledge, skills, and attitudes needed in each major job category within a treatment program. The resultant inventories are posted and used at a general session to determine the objectives for in-service staff training programs.

VIII. B. The methodology of in-service training will be outlined by the trainer. The content to be covered includes the importance of an orientation period; the supervisor's responsibility for individual and group training; group norms in the work situation; approaches to training nonprofessionals; the roles of the technical assistance staff, research projects, assigned readings, staff library, staff committees and meetings, and interagency visits. Work groups will outline appropriate staff development programs.

VIII. C. The session will conclude by analyzing factors that hinder a successful in-service training program and those that promote success. Information on the principles and methods for evaluating training programs will also be included.

TRAINING DESIGN

Following is an outline of the lecture/discussion. Space for notes is provided.

I. What Is a Training Design?

A. A functional design should include

1. Behavioral objectives
2. *What* the trainee will learn--the topic to be covered, task to be performed, or activity to be undertaken
3. *How* the trainee will learn--a description of the methodology, specifying trainer and trainee behavior
4. *Time* in which each portion of the methodology will be accomplished
5. *Materials* and/or equipment needed

B. Sample format (adapted from NJCATI, 1968)

Title of Session: ____________________

Behavioral Objectives: ____________________

TIME	WHAT	HOW	MATERIALS & EQUIPMENT

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C. Characteristics of a functional design

II. The Importance of a Training Design (Veri and Haar)

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III. The Training Design Model: The E-I-A-G Process (NJCATI, 1968)

A. E--Experience

B. I--Identify

C. A--Analyze

D. G--Generalize

IV. Developing a Training Design

A. The training design and the trainee

B. From behavioral objectives to a methodology

Whenever decisions are made about methodologies, the training designer must be able to move from the expected outcome of the methodology to the content to the learning tasks and back to the accomplishment of the behavioral objective(s)

C. Choosing a methodology (Miles, 1973)

1. Knowledge

2. Attitudes

3. Behavioral skills

4. Job performance

D. Organizing the methodology: selecting and ordering activities (Miles, 1973 and NJCATI, 1968)

1. Appropriateness to trainee needs

2. Relation to the trainer's range of competence

3. Inherent self-evaluation and correction

4. Multiple learning

5. Impact

6. Order of activities

7. Variety of activities

8. Practical considerations

E. Clarity of the design

V. Summary: Two Approaches

A. First approach

1. Step one

2. Step two

3. Step three

4. Step four

5. Step five

B. Second approach

TAS FIVE: SELECTING TRAINING METHODS, A STRUCTURED EXPERIENCE

Goal

The goal of TAS FIVE is to provide practice in selecting training activities and establishing times for them.

Description

In TAS FIVE you will be given the behavioral objectives and learning tasks for a training session. As three-person teams, select appropriate training activities and techniques and establish the time periods for the activities. Be as creative and realistic as possible. Remember that form follows function. Use the list of training activities on p. IV-43 , or use other activities with which you are familiar. Write your design on newsprint for a report to the total group.

Comments

TRAINING ACTIVITY SHEET FIVE: SELECTING TRAINING METHODS

TITLE OF SESSION: IMPROVING INTERPERSONAL COMMUNICATION

DAY: One

TRAINING GOAL: To improve interunit and interoffice communication

OBJECTIVES:

At the end of the training, and with the aid of notes, the participants will be able to:

1. Given a situation, demonstrate at least five feedback rules
2. Identify and list at least four helping behaviors and four behaviors that hinder communication
3. Identify and list at least four barriers to communication
4. Demonstrate at least four behaviors that contribute to effective two-way communication

WHAT the trainees will learn (learning tasks):

- Helping behaviors to communication
- Hindering behaviors to communication
- Barriers to communication
- Feedback rules
- Listening techniques
- Questioning techniques
- Nonverbal behavior

TRAINING DESIGN WORKSHEET

TIME	WHAT	HOW	MATERIALS & EQUIPMENT

TRAINING DESIGN WORKSHEET

TIME	WHAT	HOW	MATERIALS & EQUIPMENT

TRAINING DESIGN WORKSHEET

TIME	WHAT	HOW	MATERIALS & EQUIPMENT

TRAINING METHODS*

The alphabetical list below presents thirty-four training methods. While each is briefly described, a trainer should seek more detailed information about the effectiveness of each method in sources such as METHODS IN ADULT EDUCATION by Morgan, Holmes, and Bundy, ADULT EDUCATION PROCEDURES by Bergevin, Morris, and Smith, and 24 GROUP METHODS AND TECHNIQUES IN ADULT EDUCATION, by Educational Systems Corporation.

1. ASSIGNMENTS

Commonly called "homework," assignments include reading, writing, viewing, or listening tasks given to trainees as preparation for a topic to be presented or as a follow-up to a presentation. Trainers are expected to review the assignments and to give trainees feedback if possible.

2. AUDIENCE REACTION TEAM

An audience reaction team generally consists of two to five trainees who react to a presentation. Members of the team are expected to interrupt the presentation to seek immediate clarification of points that are not clear, and otherwise help the speaker to meet the specific needs of the trainees. The Audience Reaction Team can be an aid to communication and can help stimulate audience interest.

Since interruptions and questioning can sometimes make a speaker feel that he is a poor communicator, the Audience Reaction Team moderator should help control the tone of sessions with appropriate interventions. The moderator can also encourage timid members of the team to voice their reactions. Most of the audience will remain passive, so the trainer may want to use a disucssion period following this to allow full audience participation.

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*Sources are Clive C. Veri & T. A. Vonder Haar, authors of *Training the Trainer*, U. of Missouri, Extension Division, St. Louis; and *24 Group Methods and Techniques in Adult Education* by Educational Systems Corporation, Washington, D. C.

3. BRAINSTORMING

Brainstorming is a technique for which creative thinking is more important than practical thinking. Participants spontaneously present ideas on a given topic. No idea is dismissed or criticized; anything offered is written down. The purpose of this technique is to obtain as many ideas as possible and for participants to stimulate each other's thinking. After the listing of ideas is completed, the group clarifies, categorizes, or discusses one item at a time--depending on the situation. Brainstorming can stimulate new ideas and new solutions to previously insoluable problems because of the freedom of expression that is encouraged.

After the listing is completed group members critically discuss the ideas generated by others; therefore, the trainer may want to help keep criticism aimed at the subject, not at the person, and may want to point out that all ideas are valuable in this exercise because they stimulate additional thought.

4. BUZZ SESSION

The buzz session involves all members of a training group directly in the discussion process. The large group is divided into groups of three or four persons each for a brief time. In these small "buzz" groups each trainee contributes his ideas about the topic under discussion. Ideas are then reported to the entire group. The buzz session may be used to develop questions for a speaker or panel to generate information about areas of special interest, and to surface ideas about a particular topic. It gives everyone a chance to participate and can help individuals identify with the program and its goals. Because contributions of the several groups may be contradictory or difficult to combine, the trainer may want to follow with a full-group discussion of the various ideas.

5. CASE STUDY

The case study is a detailed account of a real or hypothetical occurrence (or series of related events involving a problem) that trainees might encounter on the job. The case is analyzed and discussed and trainees are often asked to arrive at a plan of action to solve the problem. Case studies can be presented verbally, in writing, on film, or any combination of media. They can help group members learn to develop various alternative solutions to a problem, and may help develop analytical and problem-solving skills.

The trainer should be aware that: (1) some individuals may not see the relevance of the case study to their own situation or to the group's problem; (2) a considerable amount of time and thought is often required to develop the study; and (3) some group members may participate more than others.

6. CLINIC

The clinic is a meeting or extended series of meetings involving analysis and treatment of specific conditions or problems under the guidance of an expert.

7. COLLOQUY

The colloquy is a modified version of a panel in which three or four resource persons and three or four trainees participate. The trainees express opinions, raise issues, and ask questions that will be discussed by the resource persons.

The colloquy may be used to identify and explore a problem or issue, to give the audience an understanding of the various parts of a problem, and to weigh the advantages and disadvantages of a course of action. It can permit presentation of various sides of an issue, and provide audience representation and feedback from audience to expert.

It also has certain limitations. It may be difficult for the moderator to hold participants to the topic under consideration and extreme difference of opinion may block progress toward a solution. Becuase audience members are in a primarily passive role, the trainer may want to follow this with a general group discussion of the topic.

8. COMMITTEE

A committee consists of a small group of trainees selected to fulfill a function or perform a task that cannot be done efficiently or effectively by either the entire training group or by one person. A committee may be used to plan an activity, to advise the group, to study a particular problem, to promote an event, or to evaluate a particular activity. In appointing a committee, the trainer must consider how well the members will be able to work together. The trainer must also anticipate possible reluctance by the entire group to accept the committee's suggestions.

9. CONSULTATION

A consultation is a discussion between the trainer or an expert and one or more people in which he provides technical assistance. Included are telephone conversations, personal letters, on-the-job visits, and small-group activities in a training session.

10. CORRESPONDENCE COURSE

A correspondence course is a self-instructional or independent study course using print and/or nonprint materials as the educational medium. Such courses may include tutorial or small-group sessions, consultation from a trainer, written assignments, examinations, and grades.

11. CRITICAL INCIDENTS

Critical incidents are educational experiences in written, audio and/or visual, or dramatized form that simulate real life events. They generally require trainees to make decisions and perform acts in a "laboratory" setting at critical moments in behavioral situations. For example, the technique could be used to teach foremen how to handle a recalcitrant employee, or to teach interviewers how to obtain information from prospective employees.

12. DEMONSTRATION (METHOD)

The demonstration method is a presentation that shows how to use a procedure or to perform an act, or that shows that a new product or procedure has merit. It is often followed by a practice session in which the trainee carries out the activity under the supervision of the trainer. It is basically a visual presentation accompanied by oral discussion in which psychomotor skills are taught.

Some advantages to using a demonstration over other methods are: (1) people are more likely to understand what they see demonstrated as they hear it discussed; (2) actual materials and models are used; and (3) the pace is flexible and the demonstrator can move at the pace desired by the students, and repeat as necessary.

Some limitations are: (1) considerable time and expense can be involved in obtaining necessary materials, and heavy objects are difficult to transport; (2) if small objects are used, only a limited number of people can see them at one time; and (3) if only a limited number of materials are available, some members of the group may have to wait while others are going through the process of imitating what they have seen.

13. DEMONSTRATION (RESULT)

The result-type demonstration shows by example the outcome of some practice that can be seen, heard, or felt. It often deals with operational costs, production procedures, or with the quality of a product, and generally requires a considerable period of time to complete.

14. DISCUSSION GROUP

A discussion group is a meeting of two or more people to informally discuss a topic of mutual concern. It may be based on common background achieved through assigned readings or shared educational experiences. A group discussion is a good technique to use for involving the entire group. It can be used to pool the abilities, knowledge and experience of all to reach a common understanding or goal.

A good leader is needed to elicit participation from all group members and to help keep the discussion focused on the topic.

15. EXHIBITS

Exhibits are collections of related items displayed to assist in the learning process or to carry an educational, informational, or inspirational message.

16. FIELD TRIP OR TOUR

In a field trip or tour a training group visits a place of educational interest for direct observations and study. Field trips may take from four hours to two days while tours include visits to many points of interest and may require from one day to several weeks to complete. A field trip or tour may be used to provide first-hand knowledge about a subject, to stimulate interest in conditions or problems, to illustrate results of a course of action, and to relate theoretical study to practical problems.

A field trip is usually very entertaining for participants and allows them to view a subject in relation to a larger environment. Logistical problems are the major limitations: the time needed for advance arrangements, the difficulty of maintaining schedules, and the possibility of injuries to participants.

17. FORUM

A forum is a public meeting in which everyone can express his views. It can be used after a topic has been introduced by a speaker, panel, film, or other technique. The forum encourages audience participation in a large meeting and helps to develop opinions by testing ideas under fire.

The success of the forum depends upon the ability of the moderator and the maturity of the audience. As participants air their points of view, partisan controversy and heated debates may arise and can be stimulating. The moderator must help keep the discussion moving and orderly, summarizing the arguments at intervals, if necessary.

18. INFORMATION SHEETS

Commonly called "handouts," information sheets are learning aids given to trainees in support of a learning activity. They may be in narrative or outline form, written by the trainer, or reproduced from published materials.

19. INTERVIEW

An interview is a presentation in which one or more persons respond to questioning by one or more trainees (interviewers). It is used to explore a topic in depth where a formal presentation is not desired.

The interview has certain advantages. It is less formal than a speech or a lecture. The audience is represented by the interviewer, so there is some assurance that the discussion will follow the interests of the members of the audience. But one of the limitations is that the interviewer must know the subject, the audience's desires and the techniques of interviewing. Becuase the audience is basically passive while listening to the interview, the trainer may want to follow with a method that will include them in a discussion of the interview.

20. LECTURE (OR SPEECH)

A lecture is a carefully prepared oral presentation of a subject area. A lecture may be used to present factual material in a direct and logical manner, to present one point of view on a controversial subject, to entertain or inspire an audience, or to stimulate thinking and further study of a problem and to open the subject for general discussion. Lectures are suitable for audiences of any size and are easy to organize--and some people learn more easily by listening than by reading.

As a training technique, a lecture needs to be followed by another type of method. In a lecture, the role of the audience is passive and feedback is limited, so the effect of what has been said is difficult to gauge. There is no chance for challenge or rebuttal of ideas, and no chance to practice the ideas that were presented. To clarify the points made and to make certain the trainees understand important ideas, the lecture should be followed by group discussion. One way of handling this is for the discussion to begin in small groups to explore various aspects of the lecture and then move to the large group to bring the ideas together. After the discussion, the trainer may want to initiate a structured experience that gives participants an opportunity to practice what they have learned.

21. LECTURE SERIES

The lecture series is a sequence of speeches extended over a period of several days or intermittently during several weeks or months.

22. LETTERS, CIRCULAR AND NEWS

A newsletter may include an announcement or report that is mailed to many people. It often carries training information and is one way of personally communicating with many people. Not as personal as a newsletter, circular letters carry announcements, reports, and training information.

23. LISTENING TEAM

A listening team listens, takes notes, questions the presenter or summarizes a presentation. The team is used to provide interaction between a speaker and the trainees and is especially useful where the speaker is not particularly knowledgeable about a group's unique problems. A listening team can help identify the issues and, through summary or questions, can aid recall of important points.

In choosing members for a listening team, one must consider that the members will need to be knowledgeable about the subject, with no biases. Since the team may not represent the views of the majority of the audience, the trainer may want to open the discussion to the entire group, or at least allow a period for questioning by the group.

24. PANEL

A panel is a small group of resource persons assigned to discuss a topic in front of a training group. A moderator insures that order is maintained, that each resource person gets equal time, and that the topic is covered in depth. The panel may be used to identify and explore a problem or issue, to give the audience an understanding of the various parts of a problem, and to weigh the advantages and disadvantages of a course of action. It can be a useful method because it establishes contact with the audience and stimulates audience interest and discussion through frequent changes of speaker and viewpoint.

Use of the panel is limiting because it may not cover all aspects of the problem or may overemphasize one aspect, or because an extreme difference of opinion among the panel may block progress toward a solution, and because the subject may not be covered in a logical order. A skilled moderator may be needed to keep the discussion moving.

A panel discussion should probably be followed by some method that allows trainees to discuss or practice the information presented.

25. PROGRAMMED INSTRUCTION

Programmed instruction involves a self-instructional format, using print and/or other media as the training medium. Examples are programmed textbooks, teaching machines, computer-assisted instruction, dial access information retrieval systems, and other devices.

26. QUESTION PERIOD

The question period is an organized follow-up session to a lecture or speech in which trainees ask the lecturer questions. It is during this time that trainees ask for clarification of points made in the formal presentation, and take the opportunity to ask for information that was not covered by the speaker but is of interest to them.

A question period may be a good method to employ for several reasons: (1) it provides feedback to the speaker and allows some audience participation; (2) it reflects audience agreement or disagreement; (3) it encourages members of the audience to pay close attention to the speaker; (4) it is psychologically positive for the audience to know they have the opportunity to participate but do not have to do so.

A question period is most likely to be successful if the trainer schedules it as an integral part of the session. He should try to encourage timid participants to speak and to discourage others from dominating the period.

27. ROLE PLAYING

Role playing is a technique in which several individuals or a small group of trainees act out a real-life situation in front of the group. There is no script; however, the situation is described in detail as appropriate. The trainees make up their parts as they act. The role play is then discussed in relation to the situation or problem under consideration.

Role playing can be used to examine a delicate problem in human relations, to explore possible solutions to an emotion-laden problem, and to provide insight into attitudes differing sharply from those of the participants.

Some advantages of role playing are: (1) it is a dramatic way of presenting a problem and stimulating a discussion; (2) it can help participants explore solutions without the dangers of an on-the-job trial-and-error approach; and (3) it allows participants to attempt to assume the personality of another human being--to think and act as another might.

The trainer should be aware of some problems inherent in this type of method. Some participants may be too self-conscious or too self-centered to act successfully, or they may fear being made "ridiculous" before the group. The trainer may help by allowing shy participants to observe others; this may help them lose some of their fear. If all participants are going to be involved as a part of the training session, the trainer may want to use dyads or triads in which everyone is either acting or observing at the same time. This may help more timid members.

28. SEMINAR

A seminar uses a recognized expert who leads a discussion among a group of trainees engaged in specialized study. The leader generally opens a seminar with a brief presentation, often covering provocative issues, and then guides a discussion in which all trainees participate. A seminar may be the length of a single session or may take several sessions. It is used to study a subject in depth.

A seminar allows all members of the group to participate and to be involved in detailed and systematic discussion and inquiry. It also has the advantage of an available authority for guiding discussion and assisting learners.

A seminar may require a great deal of time to locate source materials to find the right person to direct the discussion, and for members to prepare reports. If the time is available, it is a good method for specialized study.

29. SIMULATION

A simulation is a structured educational experience that is generally in the form of a game that has the characteristics of a real-life situation. Simulations allow the trainee to make decisions or take action in a "laboratory" setting prior to interacting in real-life situations with people and things. Examples are driver/trainer simulators, and educational "games" such as Monopoly, Blacks and Whites, or CLUG (Community Land Use Game) that require actions by the trainees.

30. SKIT

A skit is a brief, rehearsed, dramatic presentation involving two or more trainees. Working from a prepared script, the trainees act out an event or incident that dramatizes a situation taken from on-the-job experiences. The skit may be used to introduce a topic for discussion, to highlight a situation already introduced and to show its applicability to the community or the group.

A skit personalizes a situation and promotes emotional involvement in the problem. It also stimulates interest and discussion. But there is a danger of overacting and of inappropriate humor and irrelevant action that must be avoided.

The difference between a skit and role playing is that a skit is rehearsed before presentation. Both can be enhanced through a follow-up discussion.

31. STRUCTURED EXPERIENCE (EXERCISE)

A structured experience is an experiential learning activity that is designed to achieve a certain purpose. The written design must include a goal statement, a description of the process, group size, time, materials required, and a description of the physical setting.

Structured experiences are designed to allow a participant to learn through doing. A trainer may help facilitate his learning, but the trainee discovers and validates the learning himself. This method is based on the premise that guided experience is the best teacher.

The trainer must consider several things in developing a structured experience. He must avoid attempting to make the experience do too many things; goals for the experience should be limited in number. He must also consider how ready the participants are to take risks, to experiment. Using certain kinds of structured experiences before participants are ready may seem threatening and may evoke feelings of anxiety and defensiveness, rather than openness to learning. Participants need to understand reasons for the experience: how it relates to the training and the needs of the training group. After a structured experience, trainers must allow enough time to help the group members process what they have learned so that group members are able to share and integrate learning and are not frustrated by the experience.

32. SYMPOSIUM

The symposium is a series of prepared lectures given by two to five resource people; each speaker presents one aspect of the topic. The presentations should be brief and to the point, and should generally not exceed 25 minutes.

A symposium may be used to present new material in a concise and logical way, to present several objective viewpoints, to clarify aspects of a complex problem, and to show the relation of the parts to the whole. It allows for several points of view and for comprehensive coverage of a subject. Since more than one speaker is used, audience interest is more easily stimulated.

A trainer would need to follow this with a more relaxed method that would allow the audience to become involved. After a group discussion, he might consider a structured experience of some kind.

33. TEACHING/LEARNING SYSTEMS

Teaching/learning systems include telelecture-electrowriter, all forms of television and radio, programmed instruction and teaching machines, compressed speech, dial access information retrieval systems, computer-assisted instruction, and other newer teaching/learning devices in support of a training program.

34. WORKSHOP

The workshop is a training method that permits extensive study of a specific topic. Ten to twenty-five people meet together to improve their proficiency, to develop new operating procedures, or to solve problems.

A workshop provides the opportunity for preparation for specific vocational, professional, or community service functions. It also permits a high degree of individual participation and allows for group determination of goals and methods.

It requires a lot of time from participants and staff; requires a high proportion of staff to participants; and may require special facilities or materials. Participants must be willing to work both independently and cooperatively.

TAS FIVE: (continued)

INSTRUCTIONAL MEDIA

- Chalkboards
- Flipcharts
- Display boards (cork, felt, flannel, magnetic, or hook and loop boards)
- Photos
- Overhead transparencies
- 35mm slides
- 35mm filmstrips
- Videotapes
- 16mm film
- 8mm film
- Audio-tapes
- Multi-media
- Readings

SUMMARY AND READING ASSIGNMENT

Reading Assignment

Review the paper, "The Training Design," and the resource readings in Modules V and VI.

REFERENCES

Miles, Matthew B. Learning to Work in Groups. (Revised Edition) New York: Teachers College Press, Columbia University, 1973.

New Jersey Community Action Training Institute. Community Action Training: A Handbook for Trainers. Trenton: New Jersey Community Action Training Institute, 1968.

Veri, Clive C. & Vander Haar, T. A. Training the Trainer. St. Louis: University of Missouri--St. Louis Extension Division, w.d.

Use the space below for notes.

SELECTING CURRICULUM CONTENT

by

P. L. Lowery

SELECTING CURRICULUM CONTENT

It goes without saying that the content a trainer selects or creates must be harmonious with the learning objectives that have been established for the training. That is easy. What is not so easy is finding the right blend of art and science so that what the trainer puts together does what he wants it to do in the way that he wants it done. A piece from the New England Journal of Medicine discussing the possible teratogenic effects of hallucinogens may provide the necessary information, but the chances are good that many participants won't know what teratogenic means, never mind what kind of effects they may be. Perhaps a better source, depending on the audience, might be an article from a more popular magainze such as Psychology Today that discusses whether or not the use of halluginogens produces birth defects. Or the trainer might have to pull together information from many sources and create his own resource piece.

A more difficult problem in selecting content is deciding how much information the audience needs in order to meet the learning objectives and be more effective in their work. Because the field of drug abuse is so diverse and complicated, it is sometimes tempting to try to give trainees a quick dash through everything that has been written. Not only is that impossible, some of the information may not be consistent with the points training should be trying to make. For example, if the goal is to train a group of community volunteers to handle a hotline, the trainer would probably want to stress the differing characteristics among drug abusers instead of overloading trainees with research that points out the common features of drug abusers' formative years or the similarities on personality inventories. That is not to say that such information isn't valid or that it should be discounted; it is to say that the goal is to help volunteers learn to respond to each caller as personally and sensitively as possible, to treat each caller as a special case. It's not likely that volunteers who have been told repeatedly that 98% of all drug abusers come from disrupted homes will pay as much attention to the fact that a caller may be failing in school, in a bad love affair, or frightened to death by drug-related symptoms. What the trainer must decide is how important each kind of information is to achieving the training goal.

THE TRAINING DESIGN

THE TRAINING DESIGN

WHAT IS A TRAINING DESIGN?

The result of content selection and organization tells us what the trainee is supposed to learn and in what sequence. It does not, however, tell us how this learning should take place. There are many alternatives for instructing trainees in the selected content, just as there are many different ways of practicing, working with, and using content. The selection of methods and materials should be based upon the behavioral objectives, learning tasks, and content. Unless circumstances force a trainer to do so, he should rigorously avoid any commitment to methods or media until he has identified learning tasks and compiled the curriculum.

After the curriculum is developed the trainer should begin to write a detailed step-by-step plan that describes how learning will take place during the training. This plan is called by many names: lesson plan, training plan, trainer activities outline, time-content sheet, training design. For the purposes of the TOT course we will call it the training design. A training design is an arrangement of training methods into a detailed plan for a training session (Miles, 1973). A functional training design should include the following elements:

- Behavioral objectives
- *What* the trainee will learn -- the topic to be covered, task to be performed, or activity to be undertaken
- *How* the trainee will learn -- a description of the methodology, specifying trainer and trainee behavior
- *Time* which the methodology will be accomplished
- *Materials* and/or equipment needed

Title of Session: ______________________________

Behavioral Objectives: ______________________________

TIME	WHAT	HOW	MATERIALS & EQUIPMENT

Training designs put all of this together. At this point in the training process the trainer utilizes his skills, talents and experience to describe his and his trainees' intended actions in the training room. If statements of objectives provide the blueprints for training, training designs can be thought of as detailed drawings, breaking the blueprints down into their component parts (Veri and Haar).

A functional training design has several characteristics:

- It is job-centered, i.e., based on the performance tasks of specified job(s).
- It is a written plan that emphasizes developing specific job skills; activities are structured so that trainees are required to demonstrate knowledge, skills, or attitudes.
- It is a systematic, precise design of curricula; materials, methods, media are geared to instructional objectives; instruction is based on actual training needs.
- It is based on specific behavioral objectives so that trainees achieve precise levels of proficiency and management can depend on the results.

THE IMPORTANCE OF A TRAINING DESIGN

There are several reasons why a training design is important even to the experienced trainer. A partial list (Veri and Haar) would include the following:

- A training design again specifies the behavioral objectives to be met, thereby focusing attention on the objectives and not on extraneous or peripheral content.
- It forces the trainer to organize the training/learning transaction.
- It reminds the trainer to vary the methods and media used.
- It helps the trainer develop a logical, sequential, step-by-step training session.
- It outlines the content to be covered instead of presenting a paper to be read.

- It identifies the methods, media, and equipment needed to help the trainees acquire the specified behavioral change.

- It helps the trainer build evaluation into each training session.

- It sets an example for the trainees; if the trainer is well-prepared and organized, chances are that the trainees will be well-prepared and organized and consider their training a serious business.

- It reminds the trainer that the trainees might have to prepare themselves for the next session.

- It provides a written point of departure for revising the training program.

- It serves as a detailed guide for a substitute should the trainer not be able to present the program.

A functional training design helps the trainer become more effective and efficient. The design process forces him to think through what he expects to happen and frees him in the training session to concentrate on the ongoing process; the emphasis is on the trainees, helping them learn skills to perform their job better.

THE TRAINING DESIGN MODEL: THE E-I-A-G PROCESS

A training design is an attempt to plan a group's behavior in order to help group members learn something. The basic model for the design of most training sessions is the E-I-A-G process (pronounced ee-yag). The E-I-A-G process is a structured way of learning from experience. It is based upon the concept that people learn best by being actively involved in their own learning. E-I-A-G is composed of four steps: the learner has an experience, identifies the elements of that experience, analyzes why the elements occurred as they did, and generalizes about knowledge and skills acquired in this specific situation so that they can be applied in other situations (NJCATI, 1968).

E--Experience

Experiences in the training session should be related to information and skills the trainees want to learn. Trainees might try out certain tasks they'll be expected to perform on the job. For example, a module on treatment planning might include a videotape of a client presenting his case. Trainees would then use the information from the videotape to develop a treatment plan for this client. In this case, the videotape is the *experience* element of the E-I-A-G process.

I--Identify

The trainees must identify what happened during the experience. We may notice only one or two things ourselves, but in fact *many* things are happening at the same time during any event. Pooling the group's observations of behaviors, ideas, and feelings ensures that everyone shares the same information about the experience. For example, after the experience of watching the videotape, trainees would identify the needs of the client. One person might identify two or three needs, while other group members might see, hear, and state other needs. Everything noticed should be discussed.

A--Analyze

Trainees should then think about *why* things happened as they did. They need to try to discover causes and forces--why the client expressed himself in a particular way, why he focused on some things and did not mention others, why he acted as he did. How did his actions affect the viewer? How did they affect the development of the treatment plan?

G--Generalize

After they have analyzed the situation, trainees should then apply what was learned in this specific situation to more general circumstances. What was learned from this experience in treatment planning that can be applied on the job? Generalizing is extremely important: trainees must be able to apply what they have learned in a controlled environment (the training session) to their jobs; otherwise, there is no purpose in training.

What we do naturally in "learning from experience" provides an excellent model for designing an effective training event. Training groups have a tendency to move quickly. It is very important that both the trainer and the group understand that people learn only when they take time to thoroughly identify and analyze experience.

Usually, *at least twice as much time* should be allotted to the I-A-G steps as is provided by the experience. If the practice experience takes ten munutes, the identify-analyze-generalize steps should occupy approximately twenty minutes.

DEVELOPING A TRAINING DESIGN

A trainer should ask himself the following questions:

- Are the participants going to be professional staff, paraprofessional staff, a mix? Are part-time staff included?
- How much difference is there in educational levels?
- Are there varying cultural backgrounds? Is language a problem? Will I need to rely more heavily on non-verbal communication --demonstrations, graphics?
- Are there special topics participants want to know about? Have they been involved in planning the training? In choosing topics?
- With regard to specific topics, how much do they know? How much incorrect information to they know? Will they have to be persuaded that the training is worthwhile?

The Training Design and the Trainee

As we discussed in Module I there are great variations in the way people learn. One difference is the time needed by various individuals to master a specific learning task. There are also differences in interest, need, aptitude, and achievement; differences in ability to deal with the abstract or the concrete, in the interest span, and in audio or visual perception. There are differences in the degree to which an individual needs to be guided and in the amount of practice he requires. One of the most complex tasks of the training designers is to predict the effectiveness of each type of learning experience for different types of learners. The trainer needs to think about which learning tasks specific types of learners will best accomplish.

In selecting and organizing methodology, therefore, we have to deal with two variables: what the trainee already knows that will help him master the learning tasks and the learning style of the trainee. We need to be aware of alternative methodologies to select those that will best match the abilities of the learner; we must formulate criteria for matching appropriate methodologies to appropriate students (Bonathy, 1968).

From Behavioral Objectives to a Methodology

In making decisions about the appropriate methodologies to employ in a given training design, the trainer has certain guidelines to follow. These guidelines can be phrased as a series of questions:

1. Does the methodology structure the learning situation so that--
    a. the learning tasks are fully or partially accomplished;
    b. the specific content information is taught or reinforced;
    c. previous learning is reinforced; and
    d. the behavioral objectives are fully or partially accomplished?
2. Does the content give adequate information for mastering the learning task(s)?
3. Is the selected methodology feasible in terms of scheduling and implementation of the training program?

This approach enables the course developer to systematically examine each portion of the training design and to choose the most appropriate methodologies.

Choosing Methods

The trainer must choose specific methods based on the desired training outcomes. Beginning trainers sometimes ask, "Is it more appropriate to use role playing or buzz groups in this particular session?" This query must always be answered with another query: "What are you trying to accomplish in this session?" Form follows function. It is impossible to specify the value of any particular training method without reference to the goals of the training.

In forming a methodology, one must consider which type of method best fits different training goals: a change in the trainee's knowledge, attitude, behavioral skill, or performance on the job.

The following is adapted from Miles (1973).

Knowledge

The basic requirement for altering knowledge (concepts, facts, etc.) is that information be presented clearly, and that the learner have plenty of opportunity for questioning and clarification. In short, the presenter of the information must be able to get feedback on the success of his attempts to communicate. Otherwise, it is unreasonable to expect accurate learning.

Appropriate methods for communicating information include lecture (if followed by a question period), open discussion, listing of questions on cards, etc.; symposia (in large meetings) with representatives from the audience present to question a speaker for clarification; films, TV, tape recordings, or readings with the opportunity for analysis by the training group.

Attitudes

If attitudes, feelings, or opinions are to be changed, some research suggests that it is important to provide a non-threatening situation where a person can tentatively shift his attitudes without feeling defensive or threatened. In addition, other studies (Cartwright, 1957) indicate that most attitudes are socially responsive: a person holds attitudes as a part of his membership in specific groups (such as a school staff) and more general reference groups (such as "effective English teachers"). The durability of a new attitude is probably a function of whether the learner feels approved and rewarded by an individual or group important to him when he expresses that attitude, either covertly or overtly. In general, the success of appeals to emotion, fear, prestige, or credibility as a means of opinion change is variable. A frequent finding is that the "sleeper effect" occurs--initial opinion changes are not durable; opinions often revert to their original level after some time has passed.

If attitude change is desired, it is appropriate to utilize small, informal, open-ended discussion groups where the individual will not feel threatened. To the degree that these discussion groups are important or valuable to the person, attitude changes are more likely to be durable.

Other training methods that are helpful for bringing about attitude change include interview situations in which one member listens carefully to another member's description of his job attitudes and problems, and role playing. Role playing can be especially helpful in attitude change because the learner actually experiences the new attitude, feels little threat, and is supported by other members of the training group.

The "inspirational" speaker often used in larger conferences is unlikely to bring about permanent attitude change in any intended direction (although he may be able to produce either a temporary glow or negative reaction). If the speaker is unusually nonthreatening, symbolizes an important reference group, and can help learners analyze their attitudes thoughtfully, then a talk by him may help in changing attitudes. Not many speakers meet these three criteria.

Behavioral Skills

Change in the actual ability to do something usually requires guided practice with feedback about the success or failure of the practice. Many people believe that group-relevant skills, such as keeping a discussion on the topic, can be learned by talking about or reading about techniques for coping with particular problems. However, skills must be learned through practice. It is possible to learn all about driving a car by reading a book, but the actual driving can only be learned by doing, be seeing the results, and doing it again.

Methods using video or audiotape recording and playback are helpful for improving skills in group behavior (also helpful are intermittent process analysis, use of a group observer, coaching sessions, critiques of role playing, etc.), as is any method involving immediate analysis of the effectiveness of behavior.

Job Performance

Research indicates that following through on an action usually depends on the individual's commitment to a group decision about the action. Other research indicates that follow-through after training is higher when the learner feels supported and reinforced on the job by other members of a team with whom he has attended training.

From this point of view, the best methods for influencing post-training action are those that involve group discussion and group decision-making to undertake specific actions on the job. Individual planning sessions followed be reporting to the group (for support and reinforcement) are also appropriate, as are team planning sessions and many other activities.

The Relationship of Method to Outcome

It should be apparent by now that choice of a specific method should depend on the desired outcome. Some methods can be used to promote change in more than one area; for example, role playing, with variations, may be used to bring about change in

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information, change in attitude, improvement in skill, or to help ensure follow-through on the job. The important thing is to identify the type (more usually types) of outcomes desired, and then select training methods that meet the basic requirements suggested above.

Organizing the Methodology: Selecting and Ordering Activities

In selecting and ordering training activities, the course developer must consider: the appropriateness of each activity to trainees' needs, the relation of activities to the trainer's range of competence, inherent self-evaluation and correction in each activity, multiple learning, the initial impact desired, the order of activities, the variety of activities, and a few practical points (Miles, 1973, and NJCATI, 1968).

Appropriateness to Trainee Needs

Activities should relate to the needs of trainees. Training should be designed so that participants will have practice that will be useful to them in their job situation. A person who needs to improve his interviewing skills and is in training to learn these skills should participate in related activities, such as role playing.

Relation to The Trainer's Range of Competence

This is a crude but realistic criterion: trainers should not try things they feel they cannot handle. However, some insecurity is natural, and much skill can be learned. Also, consultants or other trainers with special skills may be recruited for the training session, and new skills can be learned from observation, practice, and feedback.

Inherent Self-evaluation and Correction

Good training activities should contain provisions for their own evaluation and correction. Trainees need to be able to evaluate each activity as a learning experience necessary for an inexperienced trainer or for a training of trainers for subsequent programs.

Multiple Learning

Training activities should encompass the various aspects of learning. They should provide for cognitive, affective, and psychomotor learning. An activity that encourages facile solutions to complex problems is undesirable. A single training activity may have a rather narrow focus; however, a series of training activities should be structured so as to facilitate several levels of learning to accomplish one or more objectives. Often two or more behavioral objectives can be attained through one series of training activities; thus multiple learning at various levels is accomplished.

Impact

The initial impact of a training session is particularly important in that it establishes the tone for the session and can either facilitate or hinder learning. For example, in certain situations an activity with a dramatic impact can pique the curiosity but it may be inappropriate in other situations when training may seem threatening. The choice of activity depends on several things:

- The nature of the training content, and how readily it lends itself to various kinds of activities.
- The kind of atmosphere one wants to establish and maintain throughout the training session.
- How much the trainees need to know about the trainer and about each other.
- How much time the trainer has to present his material and the kind of presentation to which the material lends itself. (Consider whether the information will be lost because of inattention to a presentation that seems cold or abrupt.)
- What the most pressing needs of trainees are.

These and other considerations must be weighed when a trainer plans his presentation. An unpleasant, uninteresting, or merely boring first impression may be difficult to undo.

Order of Activities

The order of training activities should be determined by the objectives of each session, by the type of training, and by the training goals. There must also be a logical progression from one activity to the next.

If the trainer decides to begin a session on interviewing techniques with a role-playing exercise in a small group, he must consider which type of activity should follow to reinforce the learning gained. He may decide to use a small-group discussion to identify and highlight various interviewing techniques, or he may feel that a discussion in the large group would allow a better exchange of ideas. If he begins a session with a lecture on classes of drugs subject to abuse, he may want to follow with a discussion of the content, or perhaps with an exercise that utilizes the information presented in the lecture.

One must consider the training objectives and decide what type of activity builds on previous information and what type enhances the overall session. One would not want a lecture to follow a lecture with no chance for participants to practice what they learn. Training activities must follow a logical progression and should reflect the needs of the trainees.

Variety of Activities

A variety of activities enhances learning and makes training more interesting. By moving from didactic to experiential learning, from issues that are "heavy" and threatening to others that are less controversial, from one kind of media to another, the course developer varies activities to facilitate learning. Enough time should be allotted for participants to identify, analyze, and generalize their experiences in each training activity.

The creative trainer should be able to come up with something just right for his prospective trainees. If he has gathered the information on training needs carefully, his thoughts about what training methods might work are the most useful guides for developing a good training design.

Some common activities used in training are:

- Guided group discussions
- Group problem-solving exercises
- Buzz groups
- Role plays
- Structured role plays
- Role reversals
- Group dynamics analysis
- Nonverbal exercises
- Discussion stimulators
- Case studies
- Videotape playback
- Written exercises
- Brainstorming
- Analysis of films or videotape
- Process analysis
- Fishbowl (group observing group)

Practical Considerations

When selecting methods, the circumstances of each training situation dictate several practical considerations. In most cases, these include such things as:

- How much total time is available for the training program
- How often and how long participants can be released from their jobs
- Schedules of consultants, trainers, trainees
- Need to provide time for participants to practice skills they will use on the job
- How often and for what duration training facilities are available
- Transportation requirements (if any)
- Available funds for materials, salaries, renting facilities, food, etc.
- Time periods that trainees and trainers are able to work without becoming fatigued (varies by group)

Clarity of the Design

The overall training design must have one other criterion: clarity. The design finally selected should be planned in sufficient detail so that each person involved knows what he is to do and when he is to do it. Each step in the design should be described in detail along with notations of responsibilities and time involved.

SUMMARY

Here are two approaches trainers can use to create a training design.

The First Approach

Step One

Based upon the behavioral objectives and learning tasks, the trainer should block out a rough schedule establishing the sequence and length of training sessions. Sessions should be ordered so that one builds upon the other in a logical sequence.

Step Two

Using the learning tasks and specific content areas of the curriculum, he should list sequentially and in small steps *what* the trainees will learn in the training session.

Step Three

After listing *what* the trainees will learn, the trainer should select the methods and techniques by which they will learn each step. The trainer must be sure to include participatory activities such as discussions and practice sessions, if information is to be presented through lecture, film, demonstration, etc. He should ask himself whether the method selected is appropriate for the complexity of the learning task. Simple learning tasks generally do not require time-consuming methods or complex techniques. Even when a series of learning activities are combined into a practice session the methodology does not need to be elaborate. *Are methods varied to make training more interesting?*

As was discussed in Module I, people learn best when a variety of training methods and participatory techniques are employed. It is too simplistic to say that people learn best by doing--rather people learn best if they understand what it is they are expected to do, if they practice those behaviors, receive feedback on their performance, and practice again if necessary. If the trainer wants to impart new information he might choose a lecture, film, reading, etc. If the trainer wants to build on information that trainees already have, he might employ methods such as brainstorming, group discussion, problem solving, etc.

Variety means not just mixing methods, but matching methods to expected outcomes. The trainer should ask himself such questions as: *Am I lecturing about information trainees already know? Am I asking trainees to generate information or practice skills that they don't have? Will these activities confuse trainees unnecessarily? Will they fragment the group or create cliques that would hinder the learning process? Or do these activities facilitate the learning process?*

Step Four

When he has finished selecting his training activities, the trainer should establish approximate time allocations to complete each step of the training design. If a given activity requires more time than has been allotted for the session, he should consider other activities that might accomplish the same learning in less time. If the activities he has selected seem the most effective ways of accomplishing the learning tasks, but there isn't sufficient time in the session to accomplish them, the trainer should consider reducing the number of learning tasks (and possibly objectives) so they can be accomplished in a given training session.

It is more important that the trainees learn a few things that they can apply to their jobs than learn *about* many things and be unable to perform tasks they came to training to learn.

Step Five

The trainer should review the training design and write a detailed description of the methodology specifying the expected trainer and trainee behavior for each step.

He should read over the design and refine it if necessary, reviewing it for the following points:

- Does this plan follow the guidelines?
- Can the goal realistically be met by this plan, given the level of preparation of the trainees, their needs and interests, and the circumstances of the training?
- Does each part of the plan contribute to accomplishing the behavioral objectives? Does each step lead into the next one? Do the later steps build on learnings acquired in the earlier steps?
- Could any other method do as well or better? If so, should it be used?

The Second Approach

The second approach is similar to the first except that steps three and four are combined. After listing *what* the trainees will learn, the trainer should select the appropriate method and determine approximate time allocation for that step. As the training design is created, the trainer knows how much time has been used for each learning task in the session.

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TRAINING PROCESS

An Outline

TRAINING PROCESS

I. NEEDS ASSESSMENT

A. Assignment

1. Request for training received--by phone or mail.

2. Arrangements for needs assessment confirmed.

3. Agency staff and trainer(s) meet.

B. Needs Identification

1. The training designer (trainer) takes a look at the whole organization.

2. He develops an understanding of the organization.

3. He visits to gather information by:

a. Observation

b. Questionnaire

c. Interview

d. Performance tests

e. Group self-analysis

C. Goals Determination (Arrangement and Use of Information)

1. Trainer arranges the information to define training needs and selects the ones training will attempt to meet.

2. He arranges for meetings with the person who brought him in as a trainer and with the people to be trained.

3. Director and supervisory staff decide the priority of training needs based on the information available.

4. The trainer lists training needs in words that describe the change training should bring about.

5. From the assessed training needs he develops clear goals for training.

6. Trainees should be involved in helping to define objectives (if possible).

II. DEVELOPMENT

A. Curriculum Development (Planning the training)

1. The trainer translates training goals into specific behavioral objectives, in terms of:
    a. What the trainees will be able to do after training.
    b. How well they will be able to do it
    c. The conditions under which it will be demonstrated
2. He identifies appropriate content to support training objectives.
3. He develops sequential learning steps based on appropriate learning theory, past experience, and relation to the trainee's job.

B. Methods and Materials Selection

1. Trainer identifies the methods and materials to be used in training.
2. He states which training techniques will be used, such as:
    a. Self-instructional
    b. Audio-visual aids
    c. Group involvement
    d. Simulations
3. He looks at training methods in terms of behavioral changes desired.

C. Instructional Resources Obtained

1. Trainer obtains either "in-house" or other resources.
2. He contacts consultants, etc.

III. DELIVERY

A. Training Conducted

1. Trainer makes careful preparations for the actual training session.

2. He makes sure all materials are ready.

3. The physical environment in which training takes place should facilitate objectives, needs, content, and method of the training session.

4. He must pay attention to:

   a. Time involved

   b. Trainee attendance

   c. Entry process

   d. Contract-building

   e. Group climate

   f. Trainer role

   g. Observation

   h. Coordination among trainers

   i. Consultant role

IV. EVALUATION

A. Evaluation and Feedback

1. Trainer considers how well the training goals were achieved.

2. He uses proper evaluation instruments, such as:

   a. Pre- and posttests

   b. Observation and interviews

   c. Records

3. He generalizes from this training experience to use in other training programs.

4. He shares results with trainees.

5. He shares results with supervisory staff.

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MODULE V: DESIGNING TRAINING ACTIVITIES

PERSPECTIVE

The purpose of this module is to give participants practice in designing training sessions. Factors in the training environment that facilitate or inhibit learning are reviewed, then small groups use needs assessment reports to design training sessions. This module includes:

- Overview
- Discussion: Factors in the Training Environment
- Task Groups: Designing Training

BEHAVIORAL OBJECTIVES

Using the information presented in the TOT as criteria, at the end of this module, and without the aid of notes, participants will be able to:

1. Identify at least three physical factors in the training environment that facilitate learning
2. Identify at least three physical factors in the training environment that inhibit learning
3. Identify at least three psychological factors in the training environment that facilitate learning
4. Identify at least three psychological factors in the training environment that inhibit learning
5. Given a needs assessment report, design a training session to meet at least one of the training needs identified in that report

MODULE V: DESIGNING TRAINING ACTIVITIES

OVERVIEW

Module V is the first in a series of three modules in which participants practice skills for designing and delivering training. The module begins with a review of the factors in the training environment that facilitate or inhibit learning; then small groups design a training session, a segment of which they will deliver to the entire group in Module VI.

DISCUSSION: FACTORS IN THE TRAINING ENVIRONMENT

Following is space for notes on the discussion.

I. Physical Factors that Facilitate Learning

II. Physical Factors that Inhibit Learning

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III. Psychological Factors that Facilitate Learning

IV. Psychological Factors that Inhibit Learning

V. Creating An Effective Climate for Learning

A. What an effective learning climate is

B. Training group norms

C. How to establish a good climate for learning

D. Use of warm-up (ice-breaker) exercises, energizers, and trainee feedback (verbal evaluations of training)

TASK GROUPS: DESIGNING TRAINING

Goal

The task groups are designed to provide participants with practice in developing a training session from a needs assessment report.

Description

Each small group will be given a needs assessment report. Choose one training need from that report to use in developing a training session. Determine your training goal, write behavioral objectives, and design a training session. Members of your small group will deliver a 30-minute segment of that training session in Module VI. You may use any materials in your manual. After completing your training design, each small group member should choose a role for the presentation.

Comments

ASSIGNMENT: TASK GROUPS

The director of the State Department of Drug and Alcohol Services has decided to form a training component in the agency. She has selected a group of ten persons to be trained as trainers. Some of these individuals are state staff and some are consultants. All are very knowledgeable about drug and alcohol treatment; however, none of them have any training experience. One third of the group have been professional counselors; another third have been supervisors in treatment programs, and the remainder are state staff who have been providing assistance to treatment programs for the past two years.

The director has contracted with you to conduct twenty three-hour training sessions with her staff to train them to be trainers.

Last month you conducted a needs assessment in which you talked with the director and all of the prospective trainees. The results of your needs assessment are that after training state staff and consultants will be expected to--

- conduct needs assessments of treatment programs;
- identify training needs;
- construct training plans that include training goals, behavioral objectives, and training design;
- select consultants to deliver training;
- evaluate consultants' performance in terms of training ability, including group process skills;
- evaluate training delivered by consultants in terms of appropriate learning theory and instructional methods and techniques;
- evaluate training delivered by consultants in terms of their ability to set the training climate in learning groups;
- evaluate training programs.

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Your task is to select one of these training needs and design a training session to meet that need. If you wish, divide the training need into smaller, more specific needs and design your training session to meet one or more of those. You may use any method or technique demonstrated or discussed during the TOT, create your own, or use those you've read or heard about; however, you may not replicate any modules of TOT. Create your own design.

Space for notes:

BEHAVIORAL OBJECTIVES

NEED

GOAL

BEHAVIORAL OBJECTIVE(S)

1.	2.
LEARNING TASKS:	LEARNING TASKS:

BEHAVIORAL OBJECTIVES

NEED

GOAL

BEHAVIORAL OBJECTIVE(S)

1.	2.
LEARNING TASKS:	LEARNING TASKS:

BEHAVIORAL OBJECTIVES

NEED

GOAL

BEHAVIORAL OBJECTIVE(S)

1.	2.
LEARNING TASKS:	LEARNING TASKS.

BEHAVIORAL OBJECTIVES

NEED

GOAL

BEHAVIORAL OBJECTIVE(S)

1.	2.
LEARNING TASKS:	LEARNING TASKS:

BEHAVIORAL OBJECTIVES

NEED

GOAL

BEHAVIORAL OBJECTIVE(S)

1.	2.
LEARNING TASKS:	LEARNING TASKS:

BEHAVIORAL OBJECTIVES

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GOAL

BEHAVIORAL OBJECTIVE(S)

1.	2.
LEARNING TASKS:	LEARNING TASKS:

BEHAVIORAL OBJECTIVES

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1.	2.
LEARNING TASKS:	LEARNING TASKS:

BEHAVIORAL OBJECTIVES

NEED

GOAL

BEHAVIORAL OBJECTIVE(S)

1.	2.
LEARNING TASKS:	LEARNING TASKS:

TRAINING DESIGN WORKSHEET

TIME	WHAT	HOW	MATERIALS AND EQUIPMENT

TRAINING DESIGN WORKSHEET

TIME	WHAT	HOW	MATERIALS AND EQUIPMENT

TRAINING DESIGN WORKSHEET

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TIME	WHAT	HOW	MATERIALS AND EQUIPMENT

TRAINING DESIGN WORKSHEET

TIME	WHAT	HOW	MATERIALS AND EQUIPMENT

ABOUT THE RESOURCE PAPERS

In Module IV some basic definitions and descriptions of training activities were given. These resource papers provide additional information to assist you in selecting training aids and activities.

- *Training Aids: Use and Preparation* is a detailed discussion (from the perspective of training in industry) of how to use aids effectively
- *Training Design: Learning Levels* depicts the relationship between acquisition of knowledge and performance of new skills
- *Checklist: Content Selection, Checklist: Methods and Materials,* and *Checklist: Training Designs* are reminder sheets
- *Suggestions for Choosing Training Activities and Aids* provides suggestions based on what needs to be accomplished
- *Some Learning Activities* gives pointers on how to use and what to remember about various training techniques
- *Suggested Methods for Behavior Change* lists types of behavior change that is the desired outcome of training and some methods to use to achieve this
- *Some Other Ice Breaker Activities* lists some activities that help participants get to know one another and help identify which group members may be possible resources
- *Training Aids* describes some special considerations you should be aware of when using training aids
- *Training Arrangements* outlines some of the considerations that must be made before training
- *Conference Request Forms and Checklist* are sample forms that can be used in preparing for a conference

TRAINING AIDS: USE AND PREPARATION

TRAINING AIDS: USE AND PREPARATION

Training aids convey information and ideas to trainees by appealing to their senses of sound, sight, and touch. Properly utilized training aids can greatly facilitate the learning process. Because they appeal to several senses, they help trainees comprehend the subject matter more effectively.

In general, training should be designed to help trainees perform more effectively on the job; the selection of training aids should be based on this principle.

It is important to remember the following when selecting and utilizing training aids:

1. *Analyze the content* area to determine what aspects of it may be presented more effectively with use of a training aid.
2. *Coordinate* the use of the training aid with the total presentation of the subject.
3. *Rehearse* the presentation. Even though you may feel "silly" at the time, you'll be glad that you "practiced" during the actual presentation.
4. *Prepare the equipment* so that it will be ready for use *before* it is needed. (A chalk board with no chalk is like a car with no gas.)
5. The training aid is *not a crutch*--it is to facilitate training/learning. It is not a substitute for training.

USE OF A FLIP CHART

When using a flip chart (sometimes called newsprint) to record group comments, it is important to:

- *Talk to the group* as you write. Try to angle the equipment so that your back will be to the group as little as possible.
- Periodically, *move away* from what has been written or drawn so that the entire group can see the chart.
- When appropriate, *prepare* as much of the chart as possible in advance.

- *Develop complex points*, step by step. Don't try to write everything that is said.
- Insure that there is *plenty of paper* and an ample supply of felt tip pens.
- *Write legibly.* If you can't, print. If you can't do that legibly either, a second person could do the writing.

USE OF A CHALK BOARD

When using a chalk board, the same "rules of thumb" apply as for the use of the flip chart. The main difference is that an ample supply of chalk and a *good* eraser are essential. The greatest disadvantage in using a chalk board is the most obvious, it's messy!

USE OF CHARTS AND/OR DIAGRAMS

A chart or diagram is often used as a visual aid to reinforce verbal explanations. The supervisor/trainer should refrain from displaying a chart until he wishes to create maximum interest. Charts/diagrams should be kept simple, eye-catching, and easy to read. Other charts/diagrams relevant to the total training session may be displayed throughout the session so that the trainees can refer to them from time to time.

USE OF AN OVERHEAD PROJECTOR

The overhead projector is one of the most commonly used training aids. It is particularly useful for a flexible presentation in which the comments may vary considerably in length, depending upon the responses from the group or in a presentation that must be kept flexible in sequence.

When using the overhead projector, it is very important to:

1. *Completely familiarize* yourself with the equipment. (It is very expensive.)
2. *Check the projector* to insure that it is working properly *before* you plan to use it in actual training. (An extra bulb on hand helps.)
3. Place the screen so that it is *visible to all members* of the group and that the projector *and* you are out of the line of vision of the screen.

(NOTE: This is a great opportunity for the supervisor/trainer to move around among the group and get out from behind the desk.)

4. If the screen is not available, is inadequate, or is in the way of the rest of the training, a *good wall will serve the purpose.*

5. The message on transparencies for overhead projectors should be simply stated, quickly understood, and easily read.

TRAINING DESIGN: LEARNING LEVELS

ACQUISITION OF KNOWLEDGE

Every skill involves a basic set of facts that the trainee must know.

These facts may be *acquired* by listening, reading, watching, or a combination of these.

Trainees will incorporate new facts and information into their existing "body of knowledge" to meet requirements of the next level.

PRACTICE OF KNOWLEDGE

At this level trainees are asked to *apply* knowledge/information from Level I to problem(s) or situation(s) structured for this purpose. These include questions and answers, simple and/or complex exercises, worksheets, etc.

This practice enables trainees to *use* the newly acquired knowledge in a structured, controlled manner that enables them to begin building skills and gaining confidence.

PERFORMANCE OF NEW SKILLS

Since the terminal objective of any training course is to equip employees to perform certain job(s), controlled, structured practice of the knowledge is not enough.

Trainees must be "released" to *perform* the tasks in a real or well-simulated situation. Application of the practiced knowledge under these conditions provides opportunity to carry out the tasks in the manner of a job assignment. Product of this "assignment" demonstrates trainees' *performance*.

CHECKLIST: CONTENT SELECTION AND ORGANIZATION

Which of these options will enable you to organize the subject matter or content in a meaningful instructional sequence?

1. ____ *Logical order:* Content is presented in order of difficulty or in accordance with a logical arrangement of the subject matter, e.g., prescribed sequential operations

2. ____ *Problem-centered organization and sequencing:* The inductive approach that moves from the specific to the general, from examples to the development of rules

3. ____ *Job performance order:* Organization based on sequence in which a job or task is actually performed

4. ____ *Psychological order:* Organization of content and learning experiences based on ease of learning, for example,

   old to new
   simple to complex
   familiar to the unknown
   concrete to the abstract
   practical to theoretical
   present to future

CHECKLIST: METHODS AND MATERIALS

Factors to consider in selecting methods and materials:

1. ____ *Instructional objectives:* Overriding consideration in the selection of methods and materials is the objective of instruction.

2. ____ *Course content:* Nature of the content is appropriate for the method and materials of instruction.

3. ____ *Trainee population:* Size of the trainee group, educational level, aptitudes, and reading and speaking ability are appropriate for the method and materials of instruction.

4. ____ *Instructiors:* The number, quality, and competencies of available instructors are appropriate for the methods and materials of instruction.

5. ____ *Space facilities and equipment:* Required space, facilities, and equipment are available for the methods and materials selected.

6. ____ *Time:* The time is available for use of a particular method or materials.

7. ____ *Costs:* The cost of development and presentation have been considered.

CHECKLIST: TRAINING DESIGNS

HEADING

1._______*Are the objectives stated in performance terms?*

2._______*Are the objectives stated from the point of view of what the trainee will be able to do?*

INTRODUCTION

1._______*Is there a "tie-in" or transitional statement from previous lesson or topic?*

2._______*Is there a motivational statement highlighting the importance, usefulness, interest, etc. of the lesson to the trainee?*

3._______*Are the objectives effectively communicated to the trainees?*

DEVELOPMENT

1._______*Are the main and supporting points outlined and developed in logical order?*

2._______*Are there sufficient directions provided for the instructor (procedures, training aids, references, reminders)?*

3._______*Are necessary questions and answers provided as appropriate, e.g., for guided discussions?*

SUMMARY

1._______*Are the main points and/or conclusions recapitulated?*

2._______*Is there a "tie-in" or transitional statement to forthcoming lessons or job experiences?*

SUGGESTIONS FOR CHOOSING TRAINING ACTIVITIES AND AIDS

SUGGESTIONS FOR CHOOSING TRAINING ACTIVITIES AND AIDS*

Techniques are tools -- no one method or aid serves all purposes. Like clothing, they must fit if they are to be comfortable when used, and they must be adjusted and combined in new ways for each occasion. Those chosen should fit the purpose of the training, strenghten feelings of fellowship and the motivation to master knowledge and skills, and allay anxious feelings of dread or confusion. Know your students and their learning needs and objectives, the time and resources available. Plan ways to emphasize the essentials, to change the pace, to contrast personalities, voices and points of view, and to involve the participants individually and actively in the process of teaching/learning. Help them stretch, to reach beyond their grasp.

WHEN TRAINING SHOULD:	TRY:
Attract attention, stimulate interest	Exhibit or display with take-away bibliography or "where to write." Interest-catching visuals, such as arrows, footprints, etc. Observation opportunity trip or tour, with guides, to see the real thing. Research assignments to be reported. Mention "coming attractions" at end of session. or agenda of related meetings.
Give a lot of information quickly	Lecture with audio/visual aids -- motion picture, panel, symposium, forum, etc. Written fact sheet, distributed and discussed. Use of specialists as consultants.
Develop a common knowledge, widen horizons and the information base for individual perception.	Reading assignments, ahead and between sessions; planned observation; lecture with take-home fact sheet, discussion for sharing experience. Circular response -- same

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*Adapted from Volunteers Today by Harriet H. Naylor, Associated Press, N.Y.

	questions answered by each participant without discussion.
Deepen concern, relate individual concerns to objectives.	Assignment to state what they hope to learn. Student questions fully discussed; problem-solving work groups; case studies; planned observations and analysis; writing assignments; research report; motion picture.
Perfect skills, give competence and confidence	Group projects -- filmstrips, flip charts, diagrams, etc., each one teach one. Demonstration by experts with practice by all; drill through games, etc.; experimentation, analysis and reporting.
Generate attitudes of conviction: "this we should do."	Opportunity for self-analysis -- "where am I"; free discussion; individual counseling; collaborative projects; analysis; group decision participation; individual testing alternatives. Model leadership, care in selection and briefing. Motion picture with discussion.
Stimulate new ways of work and release creativity	Free discussion to clarify values; work groups or individual assignments to define steps in application at home; use of administrators as consultants to communicate hopes of the organization; alert for delayed action evaluation report: after a lapse of time "what I have done because I had this training."

SOME LEARNING ACTIVITIES

The trainer should plan learning activities to accomplish the training objectives. The most effective learning activities are those that encourage support, cooperation and interaction among participants.

DISCUSSION

Discussions may take several forms.

1. *Roundtable discussions* usually involve relatively large numbers (eight to twelve); all participants are considered equally "expert." The leader's role is limited to monitoring participation and keeping the discussion focused on the topic.

2. *Guided group discussion* are designed to cover predetermined areas or points. The leader uses an outline or list of "discussion points." He asks leading questions or makes provocative statements to guide the discussion. The groups may be large or small.

3. *Buzz groups* are small (three to six) and are often formed within large groups, or when the topic generates more discussion than can be handled in one large group. Each buzz group is asked to appoint a leader and a recorder. When the topic has been discussed adequately, or for a predetermined length of time, the buzz groups rejoin and report their findings.

4. *Panels* consist of three to six people who discuss or debate a topic. Each panelist represents a different point of view or specialized knowledge about a topic to be presented. Presentations may be interspersed with question and discussion periods.

5. *Listing exercises* are a form of discussion in which a group devises a list of ideas, concepts, etc., and discusses each item as it is suggested. The finished list constitutes a record and summary of the discussion.

6. *Brainstorming* is a listing exercise in which the discussion is postponed. Here's how it works:

    a. A specific topic or question is written on a chalkboard or flip chart;

    b. A short period of time (usually no more than three or four minutes) is set aside for the brainstorming;

c. The group is asked to contribute all ideas on the topic, even if they seem strange or far out, but to avoid commenting on anything suggested by anyone during the brainstorm until time is up;

d. All ideas are written on the chalkboard or flip chart as soon as they are verbalized.

Once this process begins, people are stimulated to think of less obvious ideas. The range of ideas a good brainstorming can produce is even greater than that achieved after long periods of discussion. When the time set for brainstorming is up, the group can evaluate and organize their list.

Brainstorming can be used for a number of purposes, including initiating discussion of a new topic, focusing on a subject in depth, and developing lists of ideas or topics for group work.

7. *Free discussion* depends primarily on the group climate and the skill of the trainer. Any attempt on his part to guide, control, or direct this type of discussion tends to block the expression of feelings aroused in the group.

A free discussion *does not aim at action*--rather at the expression of attitudes and values, and at getting everything out into the open. The discussion must be "safe" so that trainees can reveal their attitudes *without fear of reprisal.*

A main objective is to reconcile the differences surfaced by the discussion. Areas of disagreement must be probed and expressed.

a. *How Does It Work?*

The responsibilities of the trainer are:

1) To get the group together

2) To reduce his own psychological size and participation to a minimum

3) To introduce and maintain a free and permissive climate

4) To assist participants to recognize, clarify, and understand issues.

b. *Advantages*

Free discussion usually has the following advantages:

1) It permits attitudes and values to come to life and be expressed so that all members can be fully aware that they exist

2) It leads to a clarification of existing forces in the groups (the relationship between one's values and the values of others are clarified)

3) It is effective when a problem of acceptance arises

c. *Examples*

Free discussion may be used:

1) To "tune in" on the attitudes and feelings of other group members (e.g., workers in a unit)

2) To "check out" specific attitudes of the group

3) To overcome negative feelings between persons or toward various programs and/or policies

4) To achieve a better understanding of decisions made

ROLE PLAYS

Role plays are short "playets" involving two or more people who pretend to be someone or somewhere else. Properly used, they are one of the few activities that appeal to all of a learner's senses.

The amount of instruction given the actors can vary considerably, from detailed descriptions of what kind of person each is to be and what situation they are to be in, to simply asking two people to "act out the situation we are talking about."

Essentially, role plays are used as experiences for both actors and observers) to examine and analyze (I-A-G). The procedure involves certain steps:

1. Defining the purpose: As with any training activity, the point or objective of a role play must be clearly defined from the start.

2. Preparing the players: Players should be given some time to prepare themselves for a role play and to make certain they understand the role they are to play. In some cases, the trainer may wish to prepare them in private before the session begins. No one should ever be pressured into role playing.

3. Preparing the observers: Those who are to watch the role play must be given specific instructions about what to look for.

4. Role playing: The actual time to be spent role playing is often predetermined. However, the trainer should be flexible enough to let the role play continue beyond the allotted time if it is useful. When the needed data are clear, or when the role play moves away from the desired focus, the trainer may intervene.

5. Discussion: This is the most important part of the process. After the role play the group identifies what happened, analyzes it, and makes generalizations. All players and observers should be called upon to comment. The trainer must take care to prevent discussion from focusing on the personal characteristics of the players. Sometimes, to keep the focus on the role play and not on the role players, it helps to continue referring to the players by their assumed names.

It is often helpful to introduce a group to role plays in gradual steps, beginning with several "spontaneous and fun" role plays of situations that are unrelated to serious job problems or training needs, then moving to situations in which the participants are more serious, but not personally invested (for example, by providing a meaningful job-related situation but asking the players to assume the characteristics of people very different from themselves). Only after a group has become familiar with the technique and the participants feel comfortable under scrutiny, is it appropriate to ask participants to play *themselves* in real situations.

LECTURES

Lectures are formal presentations of information by an individual to a group of listeners. To make a lecture effective, it must have a clear introduction and a clear summary, both of which outline in an uncomplicated way, the major points of the lecture.

It should include as many examples and illustrations as possible that are related to the groups' age, occupation, interests, and experiences. It should be limited to important information. (The objective of the session as well as the nature of the material provides useful guidelines.)

The greatest problem with a lecture is the lack of involvement by the listeners. The most common way of involving a group in a lecutre is by using "question and answer" periods during and following the lecture. Another way to encourage involvement is the *reaction panel* (several participants placed between and to the side of the speaker and the audience, who ask questions for clarification during the lecture and present their reactions as a group afterwards).

A third lecture arrangement is to create *listening groups*:

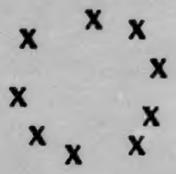
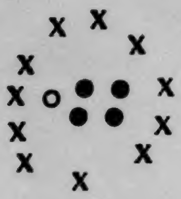
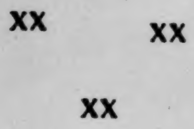
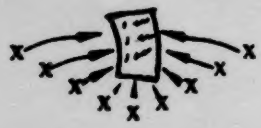
1. Immediately before the lecture, the trainer lists and numbers the major points that will be made.

2. The participants are arbitrarily assigned numbers and asked to write down the major point corresponding to each number.

3. During the lecture the participants jot down any ideas, questions, experiences, etc., provoked by that part of the lecture dealing with their assigned topic.

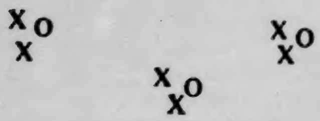
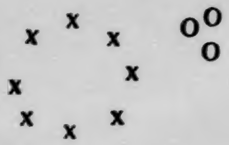
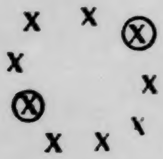
4. After the lecture, participants form small discussion groups corresponding to their numbers, share their notes, and prepare a response to the lecture.

5. The total group then reconvenes, comments and questions are shared withe lecturer and a general discussion, point by point, follows.

TECHNIQUE	USE IT FOR
1. CIRCLE CHECK 	a. To get everyone involved at the beginning b. To surface individual feelings about an issue c. To dissolve a sub-group that is taking over
2. FISHBOWL 	a. To speed up dialogue b. To guarantee a giving-receiving experience for each member in a large group c. To offer an experience to observe group process
3. PAIRING 	a. To provide a quick warm-up on a new topic b. To provide a change of pace after lecture situation c. To get everyone in a large group involved at the same time
4. BRAINSTORMING 	a. To generate many ideas in a hurry b. To structure a task-oriented climate

(continued)

(continued)

TECHNIQUE	USE IT FOR
5. MIRROR-LISTENING 	a. To show how easy it is to distort messages b. To provide practice in careful listening
6. TASK FORCE 	a. To double the group's problem-solving time b. To utilize special know-how among group members
7. GROUP CONSENSUS 	a. To provide recognition for a loyal minority without forcing a hand vote b. To promote harmony by asking group to act as one

SUGGESTED METHODS FOR BEHAVIOR CHANGE

The following chart lists types of behavior change desired and the suggested methods for each. Some methods will be more effective than others, depending upon the situation.

Knowledge (concepts, facts)

- Assignments
- Colloquy
- Committee
- Consultation
- Correspondence course
- Discussion
- Field trip or tour
- Films, TV, tapes
- Information sheets
- Lecture
- Panel
- Programmed instruction
- Readings
- Seminar
- Symposium
- Teaching/learning systems
- Workshop

Attitudes (feelings, opinions)

- Brainstorming
- Critical incidents or skit
- Case studies
- Forum
- Clinic
- Interview situations
- Open-ended discussions
- Laboratory experimentation
- Trips
- Role playing and role reversals

Behavioral Skills

- Demonstration
- Simulations
- Drill
- Tape recordings and playback
- Practicum
- Guided practice with feedback

- Role playing
- Teaching/learning systems

Job Performance

- Critical incidents
- Consultation
- Team planning sessions
- Forum
- Group discussion and decision
- Individual planning sessions with report to group

SOME OTHER ICE-BREAKER ACTIVITIES

The activities suggested below are generally helpful in at least three ways:

- as ice-breakers
- aids for the participants to get to know one another
- help in identifying group members as possible future resources

And besides, these activities are fun. This list is just a beginning, and the length of your own list will grow with your experiences.

1. *Paired Introductions*

   Each person meets and gets to know one other person and in turn introduces his partner to the entire group.

2. *Dyad and Quartet*

   Same as above, but instead of introducing his partner to the entire group, he introduces him to another dyad.

3. *One-Minute Autobiography*

   Break into groups of a dozen or so. Each person is given one minute to tell about himself. Use a timekeeper, and don't let anyone go over one minute. Restrictions can be set as to what can be talked about (e.g., nothing about job, family, home town, hobbies). These restrictions enable the participants to get right to attitudes and values.

4. *Depth Unfolding Process*

   Use this activity in small groups, because it takes five minutes per person. In the first three minutes, tell what has brought you to this point in your life. One minute is used to describe your happiest moment. The last minute is used to answer questions from others. The leader discloses first, to aid in trainee comfort.

5. *Structured Introductions*

   In dyads, small groups, or in the large group, participants can talk about their happiest moment, write their own epitaphs, write a press release about themselves, etc.

6. *Life Map*

Each person draws on newsprint with crayons or magic markers a picture of his life, using stick figures and symbols.

7. *Name Circle*

Participants sit in a large circle. The leader begins by stating the name of the person seated to his right, followed by his own name. The person to his right repeats the leader's name, his own name, and adds the name of the person seated to his right. This process is repeated around the entire circle.

8. *Sandwich Boards*

Each person writes on a sheet of newsprint "Things I Know" (about the content and purposes of the lab, areas of personal expertise, etc.). On a second sheet of newsprint, he writes "Things I Want to Know." The sheets are joined with tape, sandwich board style, and the participants mill around, non-verbally, identifying resources and getting to know one another.

9. *Consensus-Based Group Objectives*

Each person privately lists five (the number is optional) personal objectives for the lab. He shares them with a partner, and they arrive at five. The dyads go to quartets and then to octets. The octets report out their objectives (reached by consensus) and a total group set of objectives is formulated. This activity can aid in checking the contract and also help obviate the problem of hidden agendas.

10. *Sentence Completions*

A prepared list of sentences ("Anyone who smokes in front of his children". . .) is spun around the group or used in small groups.

TRAINING AIDS[*]

by

Louis S. Goodman

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[*]From *Training and Development Handbook*, edited by Robert L. Craig and Lester R. Bittel. Copyright 1967 by McGraw-Hill Inc. Used with permission of McGraw-Hill Book Company.

TRAINING AIDS

The training director must concern himself as much with the people to be trained as with the program to be presented. After the training objectives have been carefully spelled out, and the characteristics of the trainees assessed, only then can ways of reaching these goals be properly determined. These ways comprise the content and methods of the training program.

Method, then, is the bridge that carries content to the individual in a meaningful, assimilative manner. Methods of one type or another can be described as media of communication, or means to an end (objective). The discerning choice and skillful use of media as effective tools and techniques provide a significant ingredient to the success of any training program.

The gap between a *training* and a *learning* program is frequently wide because of the lack of a suitable bridging, or, if you will, media of communication. Media provide the ways and means of learning through appropriate *sensory* experience. Looking, listening, smelling, tasting, touching, and manipulating are prime, firsthand, impressive learning factors. When properly used, such experience can stamp realism and meaning into a training program.

Where raw, sensory experience cannot be employed for learning purposes because of practical considerations, as is frequently the case in many on-the-job situations, the program developer or trainer must communicate through contrived, reconstructed, or simulated means. These tools of the trade are commonly lumped together as training aids. It should be pointed out here that the raw, experiential resources of learning are much more difficult to program, but are potentially more effective than substituted media in many situations.

The training director must become knowledgeable in methods and media, particularly concerning their inherent and sometimes unique qualities. Media of communication range from the most concrete experience, as in the case of actual, productive work, to the most abstract representation of experience, as in printed or spoken words. Between these extremes, of course, lies a vast storehouse of training resources in the form of methods and aids.

Figure 1 showing various media of communication on a relative scale of concrete-to-abstract experience, depicts the range of tools and techniques available in training.

The broad array of media and methods of communication for use in the training-learning process calls for consummate understanding

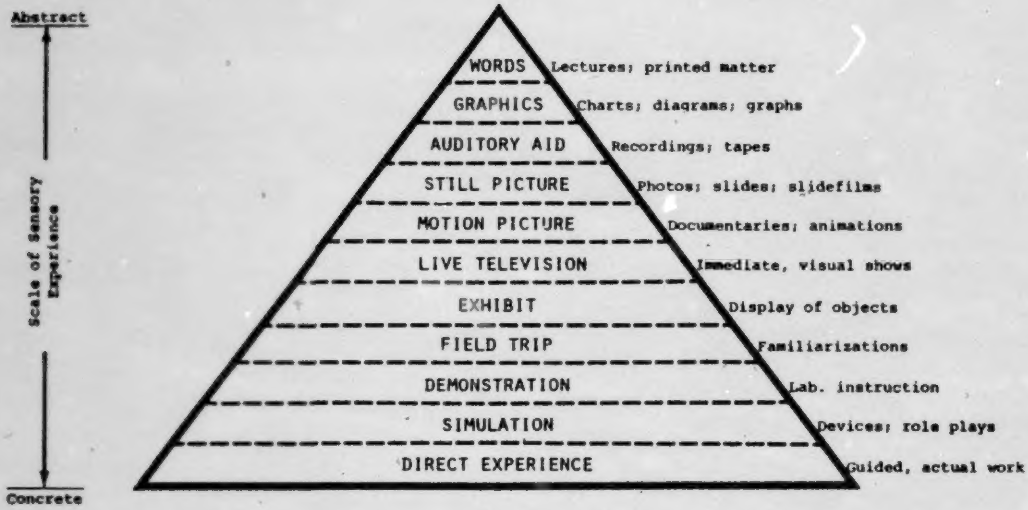
Abstract
Scale of Sensory Experience
Concrete
WORDS
Lectures; printed matter
GRAPHICS
Charts; diagrams; graphs
AUDITORY AID
Recordings; tapes
STILL PICTURE
Photos; slides; slidefilms
MOTION PICTURE
Documentaries; animations
LIVE TELEVISION
Immediate, visual shows
EXHIBIT
Display of objects
FIELD TRIP
Familiarizations
DEMONSTRATION
Lab. instruction
SIMULATION
Devices; role plays
DIRECT EXPERIENCE
Guided, actual work

FIG. 1. Media of communication.*

and a variety of skills. However, the training director or program-developer must have an awareness of the range of training resources. By infusing the training program with media appropriate to both trainees and content objectives, the ordinary, verbose classroom session, for example, can be transformed into a vital, stimulating experience leading to real learning; while in the absence of more concrete tools and techniques, the use of mere words, abstract terms, bare sentences, whether spoken or written, can have the deleterious result of providing little meaning or of being totally misconstrued by the learner in need of more tangible ways of understanding.

Therefore, to design a training program that can take advantage of more concrete resources, as these may be needed, takes considerably more than technical subject-matter competence. It demands an ability to program media, if training objectives are to be reached.

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*Adapted from author's doctoral dissertation, "The Principles, Origin and Early Development of Educational Realism." Boston University, 1942, 278 pp. Cf. author's article, "Training Comes to Its Senses," *Journal of the ASTD*, June, 1959.

SELECTION OF MEDIA

There are several criteria in choosing appropriate media and methods for a training program:

1. *Who*. Determine the *characteristics* of the group to be trained. Provide for individual differences. Consider the capabilities of the program presentors (they may need some special training on techniques).
2. *Why*. Establish the program's *objectives*, both from the learner and corporate standpoints. Which tool, technique, or combination of media will afford the greatest opportunity of reaching program objectives within budgeted limits.
3. *What*. Organize the *content* of the program in relation to the objectives. Bear in mind that media can sometimes be considered as content, such as a motion picture or direct experience.
4. *Where*. Decide on the *location* best suited to the objective of each part of the program. The classroom may not be the best place to conduct the entire training program. Examine compromise solutions to overcome common restrictions in time, travel, and cost.
5. *How*. Plan the program's *implementation* as completely as possible in advance. Proper use of the various media will require administrative attention to the scheduling of resources; the preparation, purchase, and distribution of training aids; and the setting up of suitable facilities and arrangements.
6. *When*. Provide for *media* to conform with all known elements in the training situation. Selection must be based on evaluation of factors indicated in the previous items.

The professional training man is ever mindful of these cardinal principles as he goes about the business of setting up his training program. He maintains his perspective on the full range of tools and techniques without a prejudice for or against any of them. He bases his judgment upon which media will accomplish the training tasks most economically and effectively. He provides the necessary mix in his selection to lend interest, pacing, and satisfaction while, at the same time, reaching the program's objectives. The skilled trainer plans well in advance, knowing that effective selection and use of training media bear a direct relationship to available "lead time." And finally, he retains a balanced view of costs, as between the ineffective, inefficient, useless exercise of just going through the motions of training, versus the purposeful programming of learning experiences to gain for the trainee a new standard of job performance.

TRAINING THROUGH DIRECT EXPERIENCE

Description

Direct, firsthand experience, mentioned earlier as the most concrete of all training media, can be a very powerful learning method when properly programmed. It involves the whole trainee, his physical senses as well as his mind, giving him immediate, sensory contact with the actual job environment. Direct experience incorporates the concept of "learning by doing" and activities associated with on-the-job training. The idea is among the oldest forms of teaching, and the pattern is still very much with us.

Direct experience can be a most stimulating, satisfying way to learn, but under certain conditions it can turn out to be very frustrating. The difference between these two effects is worthy of careful consideration by every organization using experience as the best teacher.

Advantages

What are its values? The clues to using the technique of direct experience in a program of training lie in its relationship to reality (actuality), its requirement for programming (guidance), and its culmination in an end product (result). Actual experience implies that the learner will get involved, that he will *participate* in a normal work task or subtask. This can result in true learning, provided that the purpose is clear to the trainee, and guidance in work performance is furnished.

Another positive characteristic is that this type of learning is unusually motivational. The technique can be programmed by the training staff or in association with line management for use in a variety of on-the-job situations. It lends itself very well to coaching as a realistic means of accomplishing certain training assignments.

Limitations

Despite obvious advantages, efficient handling of direct experience as a training technique is quite difficult. Oftentimes it becomes more expensive, both in time and money, than the more indirect methods of training. There is frequently a tendency to confuse osmotic exposure with forthright training, and in such cases it is not unusual to find misjudgment of the trainee's ability. Use of the direct technique can be disruptive to normal work procedures, thus reducing the productivity of the regular work force. Another detrimental feature sometimes encountered is the potential jurisdictional dispute arising from differences between line management and staff training in handling administrative and functional details of the trainee's program.

Application

The opportunity to employ direct experience as a training technique is present in many kinds of training situations. The following guidelines take into account some key considerations in applying this method:

1. Program the technique in relation to the learning objectives.

2. Develop a written plan to assure that these outcomes are achieved, making certain that the work supervisor (and coach) as well as the trainee himself understands both the purpose and the means.

3. Request the trainee to log any information or question that is relevant to his learning task. This will serve as an excellent feedback device for follow-up, clarification, and review.

4. Consider the establishment of a "learning laboratory" in those work situations where training results can be expected to be good. Be selective in people and places.

5. Blend theory with practice by providing for smooth transition between classroom and job through directed experience for the trainee.

To try out this technique, the training director or program developer may want to review one of his training programs and, in light of its specific objectives, ascertain the efficacy of using *direct experience*.

MEDIA OF INDIRECT EXPERIENCE

The media of *simulation*, *demonstration*, the *field trip*, and the *exhibit* are useful training techniques devised to provide indirect learning experiences. Classified on our scale as less concrete experience, they afford the learner sensory contact with a subject through a contrived rather than the actual situation.

The program developer, by using one or another of these methods, can modify or control the real-life situation to suit his training goal. He can reorganize, rearrange, or reduce reality in order to stress certain features. He can present or represent a slice of reality.

The setting for study can be the conventional training classroom, as in a demonstration of objects shown out of context to their normal environment. Perhaps more frequently, however, observation and study must be done at an outside site, as in the use of a field trip or mock-up. Where the technique calls for performance, as in a simulation exercise, limitations are placed upon the learning situation, the activity being only a substitute and not the real thing, and the learner is delayed in the actual performance of the task.

Simulation

This is most often a plan or device that incorporates certain characteristics of direct experience while avoiding some of its disadvantages for training. The closer the relationship between the contrived experience and the real job, the greater the chance of transfer. But differences between simulation and actuality should be made clear to the trainee. The simulation exercise should provide knowledge of results, preferably in some form approximating the job situation. Proper actions should be reinforced whenever possible.

The two principal types of simulation exercises used in training take the form of operational *gaming* and *mock-ups*. Business games have been applied to manager development and are descendants of the war games used in training military staff personnel. In both cases, the plan includes a set of ground rules resembling actual conditions and providing the structure for making decisions. The decision makers (players) are presented with the ground rules resembling actual conditions and providing the structure for making decisions. The decision makers (players) are presented with these ground rules, basic information about their organization, and its operating framework. Each player assumes a functional role, serving as a team member to plan, direct, and control the operation as he might do in an actual, competitive situation. Business games are available for use with or without the aid of data-processing equipment.

The mock-up or simulator is a workable device which bears a functional relationship to reality. Many were developed during World War II for the Army and the Navy, and were particularly effective in aircraft gunnery training. Today, important users of this method are the airlines, to train pilots on the ground in flight simulators. There are numerous other uses for mock-ups in industry and government where on-the-job training would be too dangerous, too expensive, or altogether too inefficient.

Sometimes a mock-up makes a task simpler to understand than having access to the real situation or thing. Where equipment or systems contain elements too small, too large, or too spread out to be studied as they are, these elements can be represented in smaller- or larger-scale reproductions, and in this way gain better training emphasis. Also, the mock-up can provide practice for the development of motor skills as well as understandings. In special situations, such as in the handling of military equipment, these devices have been built to elaborate, complicated specifications in order to come as close as possible to actual job conditions. Highly sophisticated training devices of this type are obviously quite expensive. This cost, however, must be measured against the numbers to be trained, duration of the training period, lead time available, and the importance of this training to the total project.

Demonstration

Trainers use the demonstration technique to show how something works or gets done. Normally, the learner's role is to *observe* rather than to participate directly. The demonstration is intended to illustrate or clarify an idea, process, reaction, or relationship. It succeeds as a training medium only insofar as it helps to get across or communicate meaning.

The demonstration takes on many patterns. It may incorporate other media shown on the "scale of experience." One example is the use of a cutaway model to help explain an engine's operation. Another is the showing of different hand positions in illustrating hand skills, manipulative operations, or man-machine relationships. Demonstration frequently takes the form of a laboratory experiment, the instructor serving as demonstrator and the learners as observers. A similar technique is used in sales training, where a demonstration is employed in making an effective sales presentation to show advantageous properties of a product.

The technique of demonstrating effectively takes advantage of a strong sense of realism while getting each key point across to the learner. This requires full awareness by the demonstrator of the learner's ability to comprehend what he is observing. There is room for showmanship since the technique, properly handled, can create and sustain attention, as well as stimulate further learning. In effect, when carefully prepared and skillfully conducted, the demonstration can be a dramatic learning experience.

To accomplish this takes planning plus practice in the skills needed to present an effective training demonstration. It must relate to the subject under study and, more particularly, to its objective. It should not be made more elaborate than it need be to attain the training objective. It should be interesting and short enough not to be dull. The demonstration must be tested to ascertain if all parts work and if the audience will be able to hear and see all that goes on. It must be performed by a well-qualified individual capable of explaining the functional relationships involved without becoming overly technical.

The learner, too, must be prepared so that the situation being demonstrated becomes meaningful to him. He must be motivated to learn, to become curious, to study relationships. The demonstrator or trainer must guide the learner by stimulating his observation, by drawing comparisons, and by clearly identifying significant relationships so that the learner can draw appropriate conclusions. To make sure that he does calls for follow-up activities and an evaluation of the learning outcomes. Such evaluative measurement will also serve to determine how effective the use of the demonstration was as a medium of communication.

As with each of the other media, advantages are offset to a degree by limitations. The demonstration requires considerable finesse as a training technique, particularly its application to the development of mental concepts and attitudes (as against training for physical or manual skills). Its effective use is time-consuming in its preparation and presentation phases. Is the resultant learning sufficiently worthwhile? Or is there another, a better technique to call into play in the training design? These are questions for the training director as he appraises the media to be found in his training tool kit in relation to the training problem at hand.

Field Trip

Although it is a very valuable training technique, the field trip is also one of the most overlooked. When well organized, it holds many advantages for learning. Improperly handled, the field trip is a waste of effort, time, and money.

The field trip makes use of the environment as a learning laboratory, and can best be described as a planned visit to a place away from the normal training room for specific study. Because it provides realism, the trip can be integrated into a training program to afford the deeper, more meaningful understandings so vital to the study of more abstract training topics. It provides the learner with firsthand experiences with situations, things, and operations, showing him relationships altogether not possible within the confines of a training room.

There are other advantages of the field trip for the learner. Besides providing him with firsthand information that is concrete and real, it can increase his appreciation and improve his attitude toward a job or situation. It may also arouse his interest in training. And for the program planner, the technique of the field trip has subsidiary values, such as being comparatively available and frequently less expensive than other media, and providing a more complete source of raw data than print or lecture alone. To the instructor, the field trip can help considerably as a stimulating introduction, in summarizing a topic, or as a means of verifying a point or subject in which opportunity for concrete experience has been limited.

In training, there are several types of field trips. They may vary in time, from those taking less than an hour, such as visiting an adjoining part of an office, plant, or nearby installation, to long, extensive trips to domestic or foreign sites consuming several weeks or months. The field trip can be programmed for use by an individual or by a group.

The resourceful training director avoids the idea that all training can best be done in a training room, around a conference table, or in any one special place. He recognizes that to be most effective, his training programs must necessarily transfer classroom problems into real-life situations. He knows the intrinsic value of the field trip in providing reality to an operation and tries to make the most of the technique in meeting his training objectives.

The basic structure of the field trip as a training technique can be divided into three parts: what to do before, during, and after. Preliminary preparation before the visit is essential in any plan. The site should be well known to the planner. Arrangements must be worked out for the notification of site personnel, transportation where required, finances, schedules, food, and accommodations. Added to these mechanics of the plan is the need for a clear statement of the objective(s) to be accomplished and advance discussion of questions and points to be observed for the learner.

Significant observations made during the visit should be noted by the learner, who may also want to take some photographs, samples, and specimens. Prepared questions must have answers. Time must be properly allocated to cover features in the plan.

After the trip, the follow-up should be fitted squarely into the training objective. If the main purpose was to gather specific information, this should be thoroughly discussed, or a test given; if, on the other hand, the intent was to develop a keener appreciation of a task, job, or condition, the follow-up discussion might assume the format of a problem-solving discussion. In every case, to profit from the observations made on a field trip, there must be a framework into which new data and insights can fit.

Exhibit

There are times when, for one reason or another, the sensory experiences must be confined to a conventional training room or area and cannot be obtained from the normal environment. Under these circumstances, it becomes opportune to provide substitutes or contrivances for the real thing as an aid in learning. Reality is brought to the learners, so to speak, in rearranged form to fit training requirements.

Such substitutes are exhibit media, commonly known as "objects" (the things themselves), "specimens" (typical parts of things), and "models" (replicas adapted to reasonable dimensions). The program developer uses these media to achieve a desired level of realism as a base for learning.

An exhibit, then, is an organized display of three-dimensional materials designed to instruct the observer in a given topic. Objects too large to be brought into a training room can be represented by a model. There are several types for consideration: exact-replica, reduced-scale, enlarged-scale, cutaway, exploded, and working models. If the purpose is to teach a precise function, then exactness will be required in the model used. If, however, only the appreciation of a concept is needed, detail in the model becomes less necessary.

Exhibit material, like other media, should be used especially when it can make a unique contribution to training. Its three-dimensional quality provides depth and substance and may, in addition, appeal to the senses of hearing, smelling, and tasting. These can be very relevant in certain learning situations. By permitting examination and handling, these media can show relationships, design characteristics, and shapes in an extremely effective way.

Their value in training is further enhanced by the fact that models are substitutes for originals that are unobtainable, expensive, fragile, minute, massive, dangerous, or perishable. They adapt readily to various training plans, are of intrinsic interest, stimulating--often to the point of fascination--closely observable, and frequently easier to obtain than other aids.

Effectiveness in making full training use of exhibit materials follows many of the same principles used in good advertising display. These include (1) keeping the objective in mind, (2) using collateral materials along with the key object or model, (3) making sure that the exhibit can be seen by all, (4) correcting any misconceptions in size due to scale differences, and (5) letting the observers participate where possible.

An appropriate object, specimen, or model, either selected or made, can add vitality to the learning situation. Through these media, training takes on a third dimension: for instance, showing a new product line, emphasizing waste in production, pointing up servicemen's errors on company equipment, and introducing an office or manufacturing layout to flow chart a new procedure. The resource of exhibit materials affords challenging opportunities to the training director in the training design of many types of programs.

Television

There are at least three ways in which the medium of television can make a worthwhile contribution to a training program or system:

1. TV programs produced for public consumption but applicable to an organization's information, education, or training objectives.

2. Closed-circuit television planned and produced expressly for training purposes.

3. TV kinescope recordings (16mm sound film) or videotape recordings of useful programs previously televised, now available for rebroadcast (or for regular motion-picture projection).

The question is: How much training can be accomplished through television? The scattered uses of the medium for this purpose at this time would seem to indicate that training directors are having difficulty accommodating television to their requirements. The use of commercial TV programs (item 1, above) is almost impossible in a large number of organizations because of the conflict between broadcast times and work schedules as well as the lack of viewing facilities in work environments and the infrequent relevance of TV programs to organizational training objectives. However, in times of local, regional, or national crisis, television has played an outstanding, informative role. Should the training director be prepared to share in this communication responsibility?

TV enables the instantaneous transfer of actions perceived by eye and ear from one place to another. This ability to combine sight, sound, and immediacy in bringing outside activities right into a training facility is the chief inherent value of live television.

Closed-circuit television (item 2, above) can be a real asset to training. This communication medium connects various buildings in an installation (or rooms in one building) by coaxial cable. TV programs can be channeled to any part of this system, but not broadcast over the air. Therefore, no license is required. A TV facility of this type can help materially in alleviating the shortage of instructors, specialists, or particular equipment or facilities. Closed-circuit TV may also be used to show a film simultaneously in several locations.

Except in those cases where a stringent training problem exists, in which the unique features of TV training are essential, the uses of closed-circuit TV programming are still small. Production techniques for such training programs are specialized, and a special telephonic or microwave transmission is required. Occasionally, a commercial or educational station will broadcast an internal program for an organization, industry, or business enterprise in cases where more general audience interest exists. Successful instances of effective use of closed-circuit TV for training have centered around job training skills, showing techniques in location which would be difficult to observe by other means. However, as far as becoming a common instructional aid is concerned, TV is still in its infancy.

In one type of application, where it resembles the sound motion picture, television is finding increasing uses in training. This application is the kinescope recording, or videotape (item 3, above), which is becoming increasingly available. The "instant playback" feature of recently introduced equipment makes video tape recordings a dynamic demonstration tool. Film libraries now stock kinescopes which can be borrowed or rented on the same basis as 16mm films. For all practical purposes, the techniques of using kinescopes effectively are similar to those for motion pictures.

The Motion Picture

Among the media of communication, a very close relative of television is the motion picture. One important difference for training, however, is that films can be used when, and as often as, needed without adhering to a fixed broadcast schedule. Despite its considerable advantages as a training tool, the motion picture has not yet achieved its full potential.

The film has been heralded as perhaps the greatest advance in communication media since printing. It is a universal language, capable of speaking directly to many people who do not customarily get ideas from print. Here are some things the film can do: it can present factual information, motivate learning, clarify a job skill, demonstrate action, dramatize an event, stimulate the emotions, help form an attitude, pose a problem, raise an issue, correlate isolated data into concepts, extend the range of the human eye, or summarize a situation. A great many training objectives can profitably use one or more of these routes to attainment.

Several types of films are used in training programs, including: informational, instructional, documentary, fictional, technical-scientific, episodic-provocative, and animated. Of the three standard film widths--35mm, 16mm, and 8mm--the 16mm film is by far the most widely used. Other physical differences among films relate to whether they are sound or silent, color or black-and-white, and what their mode of packaging is--whether it is continuous loop or cartridge, or the common standard reel sizes.

When the training program is designed, consideration should be given to the relative advantages of the film medium in achieving the objective. Much research over the years has indicated that learning can be expedited through films for both the rate and amount of learning in a given period, and in the amount retained over a more extended period, as compared with other techniques, particularly straight lectures. These studies, made at various educational levels for different subjects, include adult applications in the military and industrial fields.

There are other advantages in using films which may be consistent with the training plan's objective. They provide an effective means of communicating with large, widely separated groups, possibly even those with language barriers, by affording each of them a common sensory experience. By combining sight and sound in an interrelated way, expressing ideas through animated techniques that do not exist in concrete form, providing color for more realistic and vivid impressions, and permitting vicarious identification with characters in the film, this medium furnishes the training director and his program developers with a broad base of opportunity.

Once the value of films in training is acknowledged, there remain certain difficulties impeding their use. Selecting the best available film for the training task is not easy. It does take time to find, preview, secure, and return the borrowed film to its source. Making arrangements for proper projection of the film can be cumbersome. Then, too, the motion picture selected is apt to provide a pat answer to a complicated problem. However, such difficulties and weaknesses in film use can be minimized by those who have become skillful in well-established film techniques.

No one technique should be applied to using films in training. It will depend upon the type of film and the reason for showing it. The meaningfulness of films in relation to learning problems can be increased in various ways. Providing opportunities for discussion, the application of principles, practice, repetition, as well as editing out and reviewing film clips of a motion picture are just a few of these ways.

Most leaders or instructors should have a plan, although in certain learning situations, a few experienced people will object to an exact procedure. Nevertheless, for the former, the 4-P plan is effective and may be used as a guide. It includes (1) preparation, (2) presentation, (3) participation, and (4) practice.

Preparation, in part, means using the film where it fits best, logically or psychologically, in the training program. It might be useful near the beginning as a motivator, or later to add important information, help form an attitude, or develop a skill. It may serve as a summary. Sometimes the same film is used to serve all three functions. Another phase of the preparation involves previewing the film, noting its content in relation to the training objective and to other parts of the program. The training facility must be readied, including proper placement of the projection system, and seating, lighting, and ventilating arrangements. Finally, and of extreme importance, is preparing the learners. They must know in advance why the film will be shown, what to look for in it, and how it relates to preceding and following facets of their training program.

Presentation of the film will vary, the particular technique depending again on the objective. It may be necessary to show a film several times, especially in cases where film content is condensed and detailed study required. This is not an uncommon situation. Film clips may be one solution. Another variable is film showing in sound. The instructor may elect to narrate all or part of a film himself by turning off the sound. This is particularly effective in adapting visual content to a learning objective. After an initial run-through, the instructor may want to stop the film at a given point for group discussion. He may want to interrupt in this way several times during a presentation. Flexibility in projection equipment should include those features and accessories that permit a wide range of utilization techniques. Needless to say, the equipment must be kept in good working order to prevent serious disruptions to the training program.

Participation by the learners takes on many forms. Group response may be a discussion of key points or questions previously raised. In using the "single concept" film, increasingly popular with the advent of 8mm cartridge load projectors, the learner may be asked to apply the new idea to an old, familiar situation either orally or in writing. With the continuous, repetitive loop film technique, the individual trainee replies directly to the situation depicted in the film. Where the film becomes an integrated part of a mock-up, obviously the direct response may determine the consequences of the learner's overt action. Whatever the technique, active participation should be built into the method of film use whenever possible. In this way, film presentations will allow little opportunity for so-called passive learning.

Practice, as related to the function of films in training, involves the application of the principles, information, ideas, actions, or processes brought out through film techniques. It is a follow-up for the film, providing the learner with the necessary clarification to his understanding or performance of a task. Sometimes it is purely repetitive, as in developing a motor skill. At other times, practice consists of relating equipment shown in a film to actual hardware at the site of training. Or it may take the form of a demonstration or role play. Practice following film use normally leads to final review, examination or performance check-out. It helps to consummate the learning task, in keeping with the objective of the training program.

The procedure just described will help in reducing current abuses in the use of films in training. The film is but a tool, not the craftsman, and it should be evaluated as such. In addition to the relevance of its content, the film's technical quality in photography, sound, writing, direction, and acting should be at least good enough not to interfere with its message.

In considering the production of a custom-made film for training purposes, factors of use should play a significant part. What are the major criteria on which a decision can be made?

1. Does the situation to be depicted warrant the use of film, or can another, less expensive medium achieve the desired result?
2. Will the training program of which the film is a part be used by enough people to justify the production cost?
3. Is there enough lead time available to produce the film?

After the decision is made to produce a film, the training director must choose a competent film producer (unless in-house services exist). For budget purposes, the cost of a commercially produced sound motion picture can be reckoned at about $1,000 per running minute. To serve as liaison, a training staff member should be assigned to the film producer. His assistance can be most helpful in assuring technical accuracy and proper training fit of the film. Leave other aspects of the film to the producer's creative staff.

Studies on film instruction, particularly those done by the Instructional Film Research Program for the U.S. Navy Training Devices Center, provide guidelines to training-film production which can increase a film's effectiveness. Among many other significant points, these studies suggest the need for planning the film from the learner's viewpoint, not the expert's; slowing down the rate of development in the film content, not overpacking the information contained; coordinating greater learner-participation opportunities; and developing collateral aids, such as workbooks, special study assignments, and other media of instruction. Most recent developments in film production and use have brought to training the single-concept film, sequence repetition loops, film clips, and 8mm sound cartridge presentations.

Source information on films available for purchase, rent, or free loan, can be found in:

1. *Educators Guide to Free Films*, Educators Progress Service, Randolph, Wisconsin.
2. *Industrial Film Bibliography*, National Metal Trades Association, Chicago.
3. *U.S. Government Films*, Norwood Films, Washington, D. C.
4. Most state universities and larger colleges.
5. Public libraries, some of which now loan films, while most can help with above and other source references.

Judged altogether, the motion picture, in the hands of a talented trainer, can be a dynamic, vital, and effective tool.

Still Picture

When motion is not required in a visual aid to convey a concept, the use of one or more *still pictures* can frequently be of considerable help. The still picture lends itself to detailed, analytical study. The term refers to a group of visual materials made up of photographs, illustrations, transparencies, slidefilms, and slides.

These pictorial representations can portray things that might otherwise not be seen. They overcome the frequent obstructions of time and space. They help to create correct impressions by clarifying terms and giving face meanings to things. They assist comprehension, particularly by those with limited language facility. They can focus attention on a single idea, produce an emotional response, or create a mood. They can serve to motivate learning by arousing curiosity and interest in a subject.

Merely allowing trainees to look at pictures will rarely result in efficient learning. They must be led to look for relationships in the things they "see" in the picture. When a pictorial presentation is planned, each picture must have a point, or help to convey information in line with the training purpose. Unless it makes a certain definite contribution to the learning situation, the picture can have no place. This exacting criterion makes visualization through pictures a difficult training task to accomplish readily.

For this reason, in part, many training-program designers and trainers prefer to use a prepared *slidefilm*, consisting of a series of pictures printed on a strip of 35mm film, already arranged in fixed sequence. The slidefilm, variously called the "filmslide," "stripfilm," "stillfilm," or "filmstrip," capitalizes on the elimination of irrelevant, distracting motion by showing only pertinent visual data on each phase of a subject.

There are certain advantages to the slidefilm. It is compact; easy to handle and file; simple to project; comparatively inexpensive to make, buy, and use; flexible for presentation; and valuable for prolonged study. Its chief limitations are the fixed sequence of pictures, the difficulty of singling out one frame for projection, and room-darkening requirements (unless rear projection is used).

The *sound* slidefilm, commonly used in business and industry, has a synchronized recording on disk or tape. It is produced with an audible signal for (manual) frame changes or with an inaudible (automatic) signal. Basic techniques for using slidefilms in training are similar to those for using motion pictures. The training task must have well-defined objectives, problems and questions for consideration, cues for their answers, and provision for leading the group or individual into making valid generalizations.

Perhaps the most popular type of still picture in training is the *slide*. Usually, it is the 2-in. size, but the 2 1/4-in. and the 4-in. (lantern) slide are also common. Slides can be readily produced at an amateur or professional level, and can lend a true sense of reality and authenticity to the subject being learned. They have the primary advantage of flexibility in terms of changing the visual sequence of a presentation. When used in an illustrated lecture, slides permit the presenter to adapt his narration or discussion to fit the circumstances. They may also be projected handily and automatically, and their cost is very little. However, a major administrative problem in using slides for training is the need for classifying and housing them. The collection, if possible, should be standardized to one size to expedite handling, filing and selection.

Projection equipment for the various types of still pictures has seen considerable improvement and specialization over the years. The 2-in. slide projector, for example, is now an extremely versatile device, capable of holding 100 or more slides, changing and focusing remotely, and varying the image size. The opaque projector, capable of projecting flat pictures and objects, is still the workhorse among audio-visual equipment. The tachistoscope provides a shutter attachment permitting the operator to time flashes on a screen. An overhead projector is a particularly useful device in situations where the instructor should face a group while projecting images on a screen behind and above his desk. In certain situations, this instrument is displacing the blackboard for this very reason.

Auditory Aid

Learning by listening has always been an essential part of the training process. As such, auditory aids are of real assistance, even though they are relatively more abstract in terms of sensory experience. Although the audio category contains radio, public address systems, and many specialized sound devices, most commonly used in training are disk and tape recordings, especially the latter.

Recordings appeal to the ear in much the same way as pictures appeal to the eye. Both tend to reflect reality. Both enable the learner to repeat an original sensory experience. The trainer, for example, may stop a tape recording to ask a question, emphasize a point, or replay a whole section, for any reason. Through recording, the expert brings his special knowledge to bear, and doesn't have to be present himself to do so. These are important assets for training.

Tapes can be circulated and used like films, to carry a message or instruction to different locations, near and far. The tape recorder can be used to document the voices of key executives in an organization, as they express themselves on goals, problems, or matters of information to employees. It is a valuable tool for collecting data, transcribing conference talks and discussions, and for recording training sessions for later editing and use. Recordings can be made to dramatize incidents, cases, or special situations, and can be produced in conjunction with role-playing techniques, for later playback and analysis. Taping interviews with workers, managers, and others is a telling way of bringing firsthand information into a training session.

Many ready-made training courses, as used in language teaching, speech, and salesmanship, are developed on tape. The creative use of the tape recorder is an effective way of designing a number of self-development programs. Trainers may wish to place their examination questions on tape so that they need only monitor the test while trainees listen and answer. Tapes can serve trainees as an efficient means of reviewing a subject. When recorded to synchronize with visuals, such as a slide-set or a slidefilm, the tape can become a continually useful part of a planned presentation.

To take full advantage of audio experiences in a training situation calls for (1) imaginative thinking on possible applications, (2) understanding and skill in the motivational aspects of learning, (3) establishing a suitable listening environment, (4) ability in organizing and producing suitable recordings, and (5) coordinating the necessary involvement and follow-up activities for the learners. Fortunately, the tape recorder itself is simple to operate for both recording and playback use. Although four speeds are currently available on a wide variety of models, 3 3/4 inches per second (ips) or 7 1/4 ips are most commonly used for training. When making a recording, the recorded image should be lifelike and have "presence." This requires good equipment, proper microphone placement, suitable room acoustics, and careful adjustment of recording levels for tone and volume.

Tapes of significance should be cataloged and stored for easy reference and further use. Tape lends itself readily to editing, so that segments can be spliced together to fit special training needs. While one is listening, the tape recorder can be stopped at any point, and can be reversed for replay as necessary. Learning by listening, with the help of auditory aids, has the potential for becoming an important and worthy part of the training-learning process.

Despite certain drawbacks, the recorder-playback, in the hands of talented, creative training people, offers much to the enlightened training director and his staff in a wide variety of training situations. The electro-writer is a device capable of adding visuals to a telephone lecture when attached to a data set line. It can transmit handwriting and sketches over many miles of telephone lines. The transmitted visual can be projected on a screen in conjunction with the telephone talk.

Graphics

The training task sometimes demands materials that can communicate ideas and facts concisely, clearly, and logically, yet impressively. In this situation it is quite likely that the trainer will call upon graphics, which are a combination of drawings, words, numbers, and pictures. Designed in two dimensions, graphic materials are comparatively abstract, but have the ability to convey more in less time by compressing factual relationships in concepts. Actually, graphic materials fall into two broad classifications: (1) the apparatus, such as blackboards; projector easel pads; bulletin, flannel, and magnetic boards; and (2) the aids, including charts, graphs, diagrams, illustrations, cartoons, and posters.

The use of graphics offers several advantages, particularly in the presentation phase of a training program. These media will serve admirably in support of mere words when interest must be aroused, attention attracted, directions given, inspiration provided, trends emphasized, comparisons made, statistics interpreted, processes outlined, or functions related. The use of graphic symbols brings enormous areas of knowledge within the confined compass of man's vision. This distillation of experience, represented in graphic form, reduces mass data to conventionalized visual symbols--an abstract mode of communication. Learners with below-average verbal proficiency will ordinarily need more graphic demonstration than those with superior verbal skills. The graphic approach presents a vivid mental image that helps in analyzing, interpreting, and comparing relationships of data. Other significant benefits are the comparative ease in preparation, the low cost, and the flexibility of use in either printed form for individual study or projectible form in an opaque or overhead projector for group use.

The blackboard (chalkboard) is one of the oldest and most time-tested of all aids to presentation, instruction, and conceptualization. Despite its honored place, it is also one of the most abused tools of the trade. A considerable number of blackboard users violate one or more of these rules:

1. Move away from what you write or print.
2. Talk to the group, not the board.
3. Keep blackboard work legible.
4. Favor the upper rather than the lower section of the board.
5. Prepare complex drawings in advance but keep them covered until the appropriate time.
6. Use legible colored chalk for easy data differentiation.
7. Develop complex points step by step.
8. Sectionalize the board and draw relationships diagrammatically.
9. Use chalk-drawing tools if needed.
10. Keep the blackboard clean.

The easel pad is now widely used as a flip chart, particularly where a blackboard is not available. Because its size is comparatively smaller, and data exposure is normally limited to one panel at a time, it serves to concentrate attention on the orderly sequencing of points. Most often, these points have been prepared in advance, and therefore have the added advantage of serving as an outline for both speaker and audience during the presentation. Many of the conditions for effective use follow suggestions already listed as good practices for blackboard users.

Flannel boards (and much of this is true of magnetic boards) are valuable in providing a way to build up points in a presentation. The flannel material on the board has an adhesive quality to which cardboard (or other light materials) sticks when it has a backing of floktite or sandpaper. The floktite-backed cards are placed on a table near the flannel board at the proper time. Flannel board presentation data must be pointed and their position in relation to other posted material should bear significance.

Charts, graphs, diagrams, illustrations, cartoons, and posters comprise the other part of the graphics category. Each of these media has a similar role to play in getting ideas across; and for this reason, these terms tend to overlap one another in definition and use. All of them are symbolic, lie in the more abstract range of the concrete-abstract scale, and therefore require a background of knowledge sufficient for interpretation.

The chart represents information in some visual, orderly, arranged form which might otherwise be very difficult to explain in words alone. It is especially useful in condensing data to a lucid, more readily remembered format. The graph is an accurate representation of measurable data, and its function is to present them in a less confusing, more interesting way. Various kinds are in use, including pictorial (pictograph), bar, circular, and line graphs, each helpful in drawing comparisons between factors and data, such as quantity, development, function, and relationships. A diagram is a line drawing made to explain the interrelationships between facts or functions. Often the abstraction being discussed cannot be readily understood without a diagram, which can range in style from the simple sketch to an intricate schematic one.

An illustration, in this sense, is a drawing intended to elucidate a point or show an example. The cartoon is a freehand interpretation of a situation using symbolization and exaggeration to carry a message or point of view boldly and laconically. Especially effective as a visual device, it commands attention and is provocative. For similar reasons, the poster can be a telling medium, making its point through picture or drawing. It usually calls for some type of action as well.

Words

It goes without saying that without verbal communication, the training task becomes most difficult. Yet words in themselves frequently lack the power to convey adequate meaning. Much in training, however, is camouflaged in verbiage, and programs of all kinds proceed on this highly abstract plane.

No longer need the training director or program designer be so heavily dependent upon, or limit himself so narrowly (and dangerously) to the printed manual or the straight classroom lecture. With modern media and methods of communication and instruction, everyone engaged in training is faced with the challenge of arranging meaningful learning experiences in a manner that will assure more expeditious and more economical training; for through these media the ordinary trainer or lecturer can, with comparatively little coaching, reach heights in training efficiency that formerly were possible only by highly talented, well-experienced professionals.

This can be achieved in any training organization if full consideration is given to the fundamental role of sensory experiences in the learning process. In all forms of training, *ends* can never be achieved without careful consideration of the *means* or *method.*

Posttraining performance is probably as good a measure as we have for evaluating these media resources when properly used for learning and making behavioral changes. On this score, there is considerable evidence to indicate the worthiness of continuous examination, experimental use, and constant evaluation.

TRAINING ARRANGEMENTS

Before any training session certain arrangements will need to be made. Consider the following things.

PLACE

When choosing a place consider such aspects as:

- Is it conveniently located?
- Is it available at the appropriate time?
- Is there enough room?
- Are there extra rooms, places for small groups?
- Are rest rooms available?
- Is the price reasonable?
- Are eating places nearby?
- Can films or other audio-visual material be used?
- Is there possibility of distracting noise or activity?
- Is there likelihood of interruption?
- Can seating arrangements be changed?

When setting up a place consider:

- Seating arrangements
- Ashtrays
- Drinking water/coffee, etc.
- Ventilation
- Blackboard/easel, etc.
- Projector and screen

SUPPLIES

Arrange to have necessary items on hand such as:

- Name tags
- Pencils/pens/magic markers
- Newsprint pads
- Scratch paper
- Paper cups, coffee, sugar, etc.
- Masking tape
- Magazines (for pictures)
- Tape recorder, record player, projector, etc.
- Chalk

MATERIALS

Prepare or obtain materials you plan to use:

- Diagrams
- Questionnaires
- Discussion stimulators
- Information summaries
- Articles
- Evaluation forms
- Tapes, films, slides, etc.
- Charts
- Models
- Samples of literature, forms, etc.
- Transparencies
- Case studies

TRANSPORTATION

Arrange transportation for participants, if necessary, or provide instructions for reaching the training place. Be sure instructions are understandable to everyone, and that they can get to the place at the appropriate times.

CONSULTANTS

All resource people you plan to use during the training should be contacted well in advance. Make certain they understand the role they are to play, and can fulfill your expectations. Discuss their part in the training with them and offer assistance, if necessary, in planning what they will do and how it will fit into the overall design you have in mind.

Dates, times, transportation and fees should be confirmed in writing.

TECHNICAL PREPARATIONS

Any equipment you need (projector, tape recorder, microphone, speaker system, video-tape equipment, etc.) should be checked, so it's in good operation and someone is available to handle it.

NOTIFICATIONS

Check that everyone involved in any way with the program knows when the training is going to take place.

FOOD

Arrange for meals and coffee breaks, if necessary.

CONFERENCE REQUEST FORMS
AND
CHECKLIST

Adapted from Training Practitioners Clinic, Participant's Workbook, by the National Center for Alcohol Education of the National Institute on Alcohol Abuse and Alcoholism

CONFERENCE FACILITIES REQUEST FORM

Conference Number: ______________

Group: ____

Address: ______________________________ Name of Contact: ________________

______________________________ Telephone No.: ( ) ____________

Number of Participants: ______ Number of Meeting Rooms Needed: _____

Conference Dates: Start / / End / /

WRITE ALL ADDITIONAL DETAILED INFORMATION ON REVERSE SIDE.

DATE(S):	Month	Day	Year	TIME:		Number of Rooms Needed
Day 1:	/	/		From:	To:	_____
Day 2:	/	/		From:	To:	_____
Day 3:	/	/		From:	To:	_____
Day 4:	/	/		From:	To:	_____
Day 5:	/	/		From:	To:	_____

HOTEL NEEDS:

(Please submit participant name and address list and individual arrival and departure information as soon as available.)

Number of single rooms: ______ Double rooms: _____
Arrival date: ______________ Time: ______________
Departure Date: ______________ Time: ______________

TRANSPORTATION NEEDS:

(Additional details on back.)

	From	To	Date	Time(s)	No. of passengers	Station Wagon	Bus
1.				-			
2.				-			
3.				-			
4.				-			
5.				-			

MEETING ROOM NEEDS:

	Room	No. of Occupants	Time	Type of Furniture Set-up	Audiovisual Equipment				
DAY 1.			-						
			-						
			-						
			-						
	Other:		-						
DAY 2.			-						
			-						
			-						
			-						
	Other:		-						
DAY 3.			-						
			-						
			-						
			-						
	Other:		-						
DAY 4.			-						
			-						
			-						
			-						
	Other:		-						
DAY 5.			-						
			-						
			-						
			-						
	Other:		-						

EQUIPMENT NEEDS:

Item	Number Needed	In Room(s)	A-V Equipment Operator Needed in Room(s) (write in room number(s))					
1. Chalk board								
2. Flip-chart easel and pad								
3. Note pads, pens, or pencils								
4. 35-mm slide projector								
5. Opaque projector								
6. Overhead projector								
7. TV camera								
8. Videotape recorder								
9. 16-mm film projector								
10. Audiotape recorder								
11. Microphone								
12. P.A. System								
13. Other: ______								
14. Other: ______								
15. Other: ______								

FOOD NEEDS:

(Please attach detailed schedules and information as to menu preferences and types of service.)

BE SURE TO INCLUDE THE FOLLOWING INFORMATION:

1. Date
2. Time (and duration)
3. Location
4. Number of participants
5. Type of function (coffee break, luncheon, buffet, dinner, cocktails, etc.)
6. Menu preferences (hot, cold, kinds of foods, menu)
7. Kind of service (buffet, table service, bar, etc.)

CONFERENCE PERSONNEL NEEDS:

	Date(s)	Time(s)
Receptionist:	____________	____________
Other: ____________	____________	____________
Other: ____________	____________	____________

FINANCIAL NEEDS (ESTIMATED):

PER DIEM

1. Participant/Trainee per diem $________/day

   Number of days per diem_____

   Total anticipated per diem $________/Participant/Trainee

2. Conferee per diem $________/day

   Number of days per diem_____

   Total anticipated per diem $________/Conferee

3. Consultant/Trainer per diem $________/day

   Number of days per diem_____

   Total anticipated per diem $________/Consultant/Trainer

HONORARIUM/FEE

1. Conferee honorarium $________/day

   Total anticipated honorarium $________/Conferee

2. Consultant/Trainer fee $________/day

   Total anticipated fee $________/Consultant/Trainer

FINANCIAL VOUCHERING EXPLANATION TO CONFERENCE

Date and time for financial vouchering explanation and completion of forms during conference:

________________________	________________
Date	Time

CONFERENCE TASK ANALYSIS

- I. Determine Conference Dates
- II. Mail Logistics Packets
- III. Hotel and Airline Reservations
- IV. Inventory
- V. Conference Packets
- VI. Plan Check and Review
- VII. Site Preparation/Food and Meal Functions
- VIII. Financial
- IX. Conference Support
- X. Post-Conference

I. Determine Conference Dates and Number of Participants

- A. Receive conference facilities request form
- B. Discuss conference facilities request form with conference manager
    - 1. General meeting room needs
    - 2. General hotel needs
    - 3. General food needs
    - 4. General transportation needs
- C. Reserve conference space
- D. Reserve hotel rooms
- E. Review invitation letter

II. Mail Logistics Packets

- A. Draft logistics packet
    - 1. Letter
    - 2. Logistics information
    - 3. Lodging/travel form and envelope
    - 4. Itemized Expense Statement instructions
    - 5. Marriott Hotel brochure
- B. Conference Manager's review and approval
- C. Type labels
- D. Type final copy
- E. Xerox packets

- F. Stuff and mail packets

III. Hotel and Airline Reservations

- A. Record and file Lodging/Travel forms
- B. Make final hotel/airline reservations
- C. Mail travel information to participants
- D. Acknowledge changes

IV. Inventory Conference Supplies

- A. Carrying cases
- B. Note pads
- C. Pens
- D. Binders
  - 1. Small
  - 2. Medium
  - 3. Large
- E. "Where it's At..."
- F. Visitors Bureau brochures
- G. Name Badges
  - 1. Holders
  - 2. Inserts
- H. Dymo label tape (brown)
- I. Diplomas and folders
- J. Index tabs (for binders)
- K. 3-hole lined paper
- L. 3-hole xerox paper
- M. Large mailing envelopes (for logistics packets)
- N. Chalk
- O. Napkins
  - 1. Cocktail
  - 2. Dinner
- P. Plates
  - 1. Dinner
  - 2. Snack
  - 3. Bowls
- Q. Glasses
  - 1. Sherry (5 oz.)
  - 2. Drink (6 or 7 oz.)
  - 3. Water (8 oz.)
- R. Coffee
- S. Sugar
- T. Cream
- U. Tea
- V. Cocoa
- W. Stirrers

X. Masking tape

Y. Magic Markers

Z. Easel pads

AA. Soda

BB. Liquor

CC. Juices

V. Conference Packets

A. Prepare Dymo labels (2) by participant name

B. Prepare name badges for participants and staff

C. Prepare table name plates for participants and staff

D. Attach Dymo labels to carrying cases and binders

E. Stuff packets

    1. Pad

    2. Pen

    3. "Where it's At..."

    4. Etc...

F. Deliver to Administrative Assistant in charge of conference

VI. Plan, Check, and Review

A. Generic work program and facilities request form

B. Generic work program and facilities request form

C. Generic work program and facilities request form

D. Generic work program and facilities request form

VII. Site Preparation/Food and Meal Functions

A. Detailed Follow-up Discussion to I.B. above

    1. Specific meeting room and furniture needs

    2. Specific equipment needs (includes receptionist's typewriter)

    3. Specific meal and food needs

    4. Specific personnel needs (conference receptionist, additional driver/assistant)

    5. Specific transportation needs

B. Develop work plan for period of conference for assistant(s)

C. Arrange for off-hour air-conditioning and building access

D. Arrange meeting rooms

  1. See conference checklist

  2. Conference Manager's review and approval

E. Fill equipment needs

  1. Requisition or rental

F. Arrange food/meal needs

  1. Hospitality suite (see conference checklist)

  2. Donuts/snacks

  3. In-house meal functions (see conference checklist)

  4. Arrange menu with conference manager

  5. Arrange with caterer

  6. Restaurant meals

    a. Arrange with restaurant

    b. Arrange menu with conference manager

    c. Prepare custom menu

    d. Arrange for payment

    e. Menu to restaurant

G. Arrange for Additional Personnel

  7. Receptionist

    a. Phone lists

    b. Receptionist Instructions

    c. Driver/Assistant

H. Arrange for local participant transportation

  8. Hotel/Training Site/Hotel

  9. Training Site/Restaurant/Hotel

  10. Etc...

VIII. Financial

A. Estimate and request advance to cover conference's incidental cost

B. Prepare Itemized Expense Statement for each participant and Consultant trainer

C. Process participant's Itemized Expense Statements

D. Disburse expense checks to participants

E. Substantiate cash advance with receipts

F. Review and approve restaurant, hotel, and transportation bills

IX. Conference Support

A. Coordinate Assistant(s)' activities

B. Hospitality suite (see conference checklist)

C. Meeting rooms (see conference checklist)

D. Meal functions (see conference checklist)

E. Lodging and transportation changes

F. Local transportation

G. Daily feedback and coordination

H. General support

Post-Conference

A. Get feedback from conference manager

CONFERENCE CHECKLIST

I. MEETING ROOMS

1. Furniture arrangement (sufficient table space, seating, neatness)
2. Ash trays (clean and sufficient number)
3. Ice water/pitchers and glasses (sufficient number)
4. Pads and pencils (if requested--in place and pencils sharpened)
5. Audiovisual equipment (if requested)
    - A. Projection equipment (with power cables connected, stands, ready for use)
    - B. Recording equipment (audio and/or video, power cables connected, fresh tape, take-up reels, microphones, cameras, etc.)
    - C. Amplifying equipment (mike(s) on table, floor, lavalier, etc.)
    - D. Chalk board(s) and/or easel(s) w/fresh pads
    - E. Chalk, erasers, magic markers, pointer
    - F. Podium
6. Name plates in place (if requested)
7. Name badges in place (if requested)
8. Trainee packets and/or materials in place (if requested)
9. Coffee and/or food (if requested - tea, cocoa, sugar, cream, stirrers, cups)
10. Lights and ventilation (check for blown-out bulbs)
11. General neatness of room and exactness of placement of materials, equipment, and supplies

IMMEDIATE (WITHIN REASON) POST-MEETING CLEAN-UP

II. MEAL FUNCTIONS

1. Time (anticipate and check delivery time)
2. Dining furniture (sufficient number and placement)
3. Buffet furniture (not blocking traffic)
4. Basic food/menu (check delivery - salt, pepper, butter, cream, sugar, serving utensils, etc.)
5. Additional food
    - A. Soft drinks
    - B. Milk
    - C. Ice
    - D. Water
6. Supplies (when needed)
    - A. Napkins
    - B. Plates
    - C. Utensils
    - D. Cups
    - E. Glasses
    - F. Table cloths
    - G. Ash trays
7. "Left-over" containers and aluminum foil
8. Trash containers (logistically but inconspicuously placed)
9. Lights and ventilation
10. General neatness of room and exactness of placement of food, plates, utensils, etc.

IMMEDIATE (WITHIN REASON) POST-MEETING CLEAN-UP

III. HOSPITALITY SUITE

1. Drinks
   - A. Sherry
   - B. Dubonnet
   - C. Dry Vermouth
   - D. Scotch
   - E. Bourbon
   - F. Vodka
   - G. Gin
   - H. Seagram's Seven
   - I. Tonic water (quinine)
   - J. Club soda
   - K. Ginger-ale
   - L. Seven-up
   - M. Cola
   - N. Orange juice (smaller cans)
   - O. Tomato juice (smaller cans)
   - P. Apple juice (small)
   - Q. Punch or Fruit drink (quality)
2. Supplies
   - A. Plates
   - B. Napkins
   - C. Glasses
   - D. Utensils
   - E. Knives
   - F. Serving utensils (if needed)
   - G. Can opener
   - H. Cork screw
   - I. Bottle opener
3. Snacks (as requested) (Sufficient)
4. Individual invitations at hotel registration desk by 12 noon (2 p.m. latest - with correct room number and time)
5. Check announcement posted on lobby directory for correct room number and time
6. Room arranged by 3:30 p.m.
7. Room cleared as soon as possible or by 11:00 a.m. following day

A Physical Learning Climate Checklist

Space

Lighting

Acoustics/Outside Noise

Decor

Temperature

Ventilation

Seating Comfort/Position

Seating Arrangements/Grouping/Mobility/Rest/Change

Refreshment

Ash Trays

Rest Rooms

Audiovisual Aids

Coat Racks

Parking

Traffic Directions

Name Tags or Cards

Records/Addresses, etc.

MODULE VI: SMALL-GROUP PRESENTATIONS

PERSPECTIVE

The purpose of this module is to give participants an opportunity to conduct and receive feedback on a training session that they have designed. This module includes:

- Small-Group Presentations
- Feedback on Each Small Group's Presentation

Preview: Module VII

BEHAVIORAL OBJECTIVES

At the end of this module, participants will be able to:

1. Demonstrate at least two training methods
2. Demonstrate at least two techniques used by trainers to encourage participatory learning
3. Demonstrate using at least three feedback rules

MODULE VI SMALL GROUP PRESENTATIONS (DELIVERY AND FEEDBACK)

WHAT DID YOU FORGET?

1. Check with your consultant and other trainers the day before your session, just in case.
2. If other resource people are to be present, remind them also.
3. Did you reserve the room in advance? Is it still available?
4. The day of the session, check the room: is it clean, lighted, set up the way you need it (for a film, a demonstration)? Are there enough chairs? If it needs to be unlocked, where's the key?
5. Is the projector, tape recorder, or other equipment there, and in good working order?
6. Have you previewed the film or videotape to make sure it's suitable for your group? Have you checked the sound on this print? Have you checked that it's not too scratched? That it's not backward on the reel?
7. Will there be someone there who knows how to run the projector?
8. Are your other materials ready? Brochures, photos, diagrams, charts? Were you going to have copies of your training plan?
9. If you are going to be delivering the session, or part of it, are you prepared?
10. If applicable, have you reminded your participants and their supervisors about the time and place of the session?

MODULE VI: CARRY OUT THE TRAINING*

You now have a training goal, a set of objectives, and a detailed plan for achieving those objectives. As you initiate your training session, stay alert and responsive to the group. Some key areas merit special attention to insure success.

THE ENTRY PROCESS

You may encounter initial skepticism, reserve, or hostility from the training group particularly if its members were not involved in previous training with you or in the development of the program. If you sense such an attitude, a "break-the-ice" approach helps.

- Ask for questions from the floor, about yourself or the training. Answer them fairly.
- Don't consider yourself "superior," thus making your audience feel "inferior." If you can relate as a human being, they will be more open to learning from you. When the group is relaxed, go into such questions as what they have come for, what they like about their jobs, what problems they have. Feelings they have against training will usually come out. Deal with them honestly and openly.

Special problems may have to be dealt with. For instance, you may have been brought in to do training by someone who is disliked or mistrusted by the group. This may affect their attitude toward you. They may have been ordered to go into the training session when they think that it is a waste of time or they feel too busy to take time out for it. They may have had some bad experiences earlier with what was called "training." No meaningful training is going to take place while these feelings are in the way. Get them out where they can be dealt with.

Encourage people to talk about feelings that may keep them from committing themselves to learning. Listen carefully, take their feelings seriously, and show that you understand. Then discuss what can be done about these problems. Point out the ones you and the group can do something about (maybe you can even build some of them into your training program) and the ones that must be handled outside of training. If you and the group can work on one or more of the problems during the training session, their learning interest may be heightened.

---

* NJCATI, 1968

Usually, listening carefully and taking the problems seriously is enough. Often, feelings have built up because people felt there was no one they could talk to about them. When people unburden themselves, they will be ready to move on with you.

CONTRACT-BUILDING

Make clear to the group what you are prepared to offer--time, skills, things that you think will help them. Find out from them what they expect from you and what they are prepared to commit to the training. This is not a formal procedure; it is a further way of clearing the air and getting the participants to work with you.

CLIMATE IN THE GROUP

A climate or atmosphere has to be established so that people feel free to get into the *Experience, Identify, Analyze, and Generalize* process. If people fear that they will be judged "wrong" or "stupid" by the group, they won't really participate in what is going on. Learning happens more easily in a climate that is:

- *Nonjudgmental:* People and their actions are not judged as "good" or "bad." The group looks at what happens and tries to see why it happened or what made it happen.
- *Experimental:* People feel free to try out new ideas and new ways of behaving.
- *Respectful of people's feelings as well as their ideas:* People do not fear having their feelings ignored or criticized, and they can honestly express themselves *as they are*, rather than as they think others expect them to be.
- *Accepting people where they are:* People are not made to feel they have to act or not act in a certain way to be included and accepted by the group.
- *Aiming at a purpose:* Everyone in the group knows the training purpose and keeps it in mind, but no one rigidly keeps the group on "the subject."

THE ROLE OF THE TRAINER

Each person must find his own "style," his own way of behaving with a group. Some guidelines:

- *Create the climate described above.* Behave in ways that demonstrate this climate for the group. Support people who try things out. Uphold those standards when members of the group don't follow them. If someone becomes critical or ignores the feelings of other people, describe what you see happening. Explain your concern about its effect on the group's learning climate, but do not be critical of them yourself; otherwise, your behavior contradicts what you are saying.

- If the group flounders or begins to lose sight of the overall purpose of the session, introduce techniques, nonverbal exercises, etc., to *help get things going.*

- *Give your own opinions and feelings.* Be a person. Let people realize that you feel part of the group and that you care about their problems.

- *Flow with the group.* Let group members have as many chances as they can to experience success in *Identifying, Analyzing and Generalizing.* These experiences improve their skills. The more *Experiencing, Identifying, Analyzing, and Generalizing* they do in the group, the more likely they will be to use this method of looking at their performance and improving it when they return to their jobs.

- *See yourself as a resource person,* a helper rather than the leader or key person in the group. The people have to go back to their jobs and function without you. If you become too important they won't be able to take what they have learned and apply it on their own. So don't:

  be overly directive with the group

  speak before other group members can collect their thoughts

  comment excessively

- *Respond to situations as they arise.* Your feelings are your best guide. Trust your own ideas and do what seems right to you at the time. Later, go back over the things that happened; figure out why they happened and what else you could have done. You are a learner, too.

Observing During the Session

Watch what is going on and try to understand it--even while you are participating. In your mind, step back frequently and try to form an overall picture of the session as it progresses, including your behavior and feelings. Discuss your reactions with the other trainers during a break. You may spot something (or someone) blocking people from learning. See what progress people are making and what changes in behavior are happening. Keep an eye on the climate for learning, checking to see how well it follows the guidelines described above.

Some things to watch for are:

- Who talks and who doesn't at different times
- How much people really listen to each other and the trainer
- How people sit, what their facrs say, what they do with their hands, etc.
- What subjects come up again and again
- What interrelationships show up, what groups form, who interrupts whom, who follows whom
- How the group as a whole makes decisions and solves problems
- What patterns seem to devleop

Concentrate on *what* happens and *how* it happens, rather than on *judging* what is happening.

Working with the Other Trainers

The trainers have discussed the training plan and any problems between themselves before the session. If any conflicts develop, wait until the break when the trainers are scheduled to get together. Discuss differences there.

If you must deal with differences between trainers in front of the group, be honest and open. A group can learn from watching trainers work out differences if the trainers do it in a problem-solving way.

In regularly scheduled meetings of trainers at meal times, coffee breaks, etc., use the *Experiencing, Identifying, Analyzing, and*

Generalizing approach to look at what has happened. Look for what moved the group along and what blocked progress. Leave time to *Generalize*. Decide what to do, if anything, about the things you have noticed.

Include in the *Experiencing, Identifying, Analyzing, and Generalizing* what the trainers did and how they did it. Encourage the trainers to be open and to level with each other.

USING A CONSULTANT

If you decide to use a consultant, plan for two things.

- *The consultant's entry process:*

  Explain to the group who the consultant is and why he will be involved in the training session. Before he comes, plan with the group how they can make use of him, what questions they would like to ask, particular problems they might discuss with him.

  Work out with the consultant how he will enter the training group so that his purpose for being there will be accomplished.

- *What the consultant does in the group:*

  If the consultant appears, gives a lecture, answers a few questions and leaves, the people will probably listen politely, but not learn very much that they will actually use later on. To avoid this, try to have the consultant's visit be as much of an *Experiencing, Identifying, Analyzing, Generalizing* experience for the group as you can.

  You may want to start by explaining to the consultant your objectives and training plan and then asking him how he thinks he could best work with the group. Work out with him a general plan for his session with the group. Make sure that he understands that the more he involves the people when he shares his knowledge with them, the more they are likely to learn.

SMALL-GROUP PRESENTATIONS CHECKLIST

This list is for you to use as a checklist in preparing your presentation.

A. TRAINING DESIGN: Plan to begin your presentation with a brief explanation of the following elements in your training design.

_____ 1. Needs assessment: Explain how you got data to determine that your trainees need and want your instruction.

_____ 2. Behavioral objectives: Give 1) desired terminal behavior, 2) criteria, and 3) conditions.

_____ 3. Trainee characteristics: Give your assumptions about your learning audience.

_____ 4. Strategy selection: Name your media and methods and relate them to your objective(s) and your trainees' abilities.

_____ 5. Presentation

_____ 6. Evaluation: Plan to assess the effectiveness of your presentation.

B. TRAINING DELIVERY (PRESENTATION): Think about these as you conduct the training.

_____ 1. Confidence: Communicate to trainees that you know what you're doing, believe in what you're doing, and enjoy doing it.

_____ 2. Content mastery: Demonstrate that you know the subject being presented.

_____ 3. Expression: Use voice (volume, tone, pitch and talking speed), posture (poise), and gestures (alive body and facial expression) to create excitement, interest, and enthusiasm.

_____ 4. Sensitivity to audience needs: Keep aware of group's messages to you and respond/adjust in ways that keep trainees with you.

_____ 5. Time: Stay within the time allotted to you.

_____ 6. Evaluation: How appropriate was your evaluation activity in terms of trainees' energy, time constraints, etc?

C. AUDIENCE RESPONSE

_____ 1. Interest level: Did the trainees look/act interested in what was going on?

_____ 2. Involvement level: Did the trainees take part in the training event by doing and speaking as well as by looking and listening?

_____ 3. Satisfaction level: Did trainees indicate a positive response in the evaluation activity?

SMALL-GROUP PRESENTATIONS: GROUP ONE

As the group makes its presentation, take notes in the space provided below. Then fill out the two feedback forms that follow.

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

	Needs Much Improvement					*Excellent*
How well did--						
1. the training goal reflect the training need selected?	**0**	**1**	**2**	**3**	**4**	**5**
2. the behavioral objectives relate to the training goal?	**0**	**1**	**2**	**3**	**4**	**5**
3. the behavioral objectives specify:						
terminal behavior?	**0**	**1**	**2**	**3**	**4**	**5**
criteria?	**0**	**1**	**2**	**3**	**4**	**5**
conditions?	**0**	**1**	**2**	**3**	**4**	**5**
4. Were the behavioral objectives realistic?	**0**	**1**	**2**	**3**	**4**	**5**

FEEDBACK ON TRAINING DESIGN: continued

How well did--

	Needs Much Improvement					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishment of the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ____________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--	*Needs Much Improvement*					*Excellent*
	0	1	2	3	4	5
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--	*Needs Much Improvement*					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

SMALL-GROUP PRESENTATIONS: GROUP TWO

As the group makes its presentation, take notes in the space provided below. Then fill out the two feedback forms that follow.

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

How well did--	*Needs Much Improvement*					*Excellent*
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

How well did--	*Needs Much Improvement*					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishment of the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--

	Needs Much Improvement					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--

	Needs Much Improvement					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

SMALL-GROUP PRESENTATIONS: GROUP THREE

As the group makes its presentation, take notes in the space provided below. Then fill out the two feedback forms that follow.

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

	Needs Much Improvement					*Excellent*
How well did--						
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

How well did--	*Needs Much Improvement*					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishment of the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

	Needs Much Improvement					*Excellent*
How well did the trainer--						
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

	Needs Much Improvement					*Excellent*
How well did the trainer--						
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

REFERENCE

New Jersey Community Action Training Institute. Community Action Training: A Handbook for Trainers. Trenton: New Jersey Community Action Training Institute, 1968.

MODULE VII: INDIVIDUAL PRESENTATIONS

PERSPECTIVE

The purpose of this module is to give each participant an opportunity to develop, present and receive feedback on a training event. In this module each participant will deliver a mini-training session to a small group. This module includes:

- Overview
- Individual Presentations
- Feedback on Each Individual Presentation

BEHAVIORAL OBJECTIVES

At the end of this module, participants will be able to:

1. Demonstrate at least one training method
2. Demonstrate at least one training technique to encourage participatory learning

MODULE VII: INDIVIDUAL PRESENTATIONS

OVERVIEW

To improve skills in delivering training, each participant will conduct a 15-20 minute presentation and then receive feedback on his presentation.

INDIVIDUAL PRESENTATION TOPICS

Choose One:

1. Twenty trainees have just registered and are nervously awaiting the first training session. Demonstrate a technique that you think will enable the group to get ready for work.

2. Present a mediated message, i.e., present content in a form other than talking. Be ready to explain the relationship between your method and your message.

3. Your group of trainees had a party last night, and they're only "half there." The morning is dragging by and everyone is in a slump. Do something that would lift spirits and make the group come alive.

4. Feedback in the group is getting out of control--trainees are being punishing, nasty, cruel, etc. Present an intervention activity that would clear the air and enable further learning to take place.

5. Demonstrate a technique for evaluating a training event. Be able to discuss the kinds of learning activities for which this strategy would be appropriate.

6. You have had nine days of intensive training. Everyone will be leaving after posttests. Do something you think is appropriate for closing.

7. You've just been told that the video equipment promised for taping presentations is not available. Manage a discussion around possible alternatives, disappointments, etc., with the goal of reaching a decision on what to do.

8. Make a presentation on the value/nonvalue of trainer certification.

9. Explain what happens in one of the following:

a sociogram	role playing
Johari's Window	Blake's grid
Maslow's hierarchy of human needs	Transactional Analysis

10. Demonstrate how to negotiate goal agreements for a training session.

11. Demonstrate a technique to involve participants in a discussion around the issue of why people take drugs. A straight lecture is not allowed!

INDIVIDUAL PRESENTATIONS

Please use the forms that follow to record your reactions to each presentation. In giving feedback to the presenters, we will review each of the items listed on your forms.

	Presenter	Topic
1.		
2.		
3.		
4.		

INDIVIDUAL PRESENTATIONS: continued

	Presenter	Topic
5.		
6.		
7.		

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

How well did--

	Needs Much Improvement					*Excellent*
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

How well did--	*Needs Much Improvement*					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishing the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--

	Needs Much Improvement					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--

	Needs Much Improvement					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

How well did--	*Needs Much Improvement*					*Excellent*
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

How well did--

	Needs Much Improvement					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishing the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--

	Needs Much Improvement					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--	*Needs Much Improvement*					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

How well did--	*Needs Much Improvement*					*Excellent*
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

How well did--

	Needs Much Improvement					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishing the behavioral objectives?						
Method #1	0	1	2	3	4	5
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7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--	*Needs Much Improvement*					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--	*Needs Much Improvement*					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8 show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

How well did--

	Needs Much Improvement					*Excellent*
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

How well did--

	Needs Much Improvement					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishing the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--	*Needs Much Improvement*					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

	Needs Much Improvement					*Excellent*
How well did the trainer--						
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

	Needs Much Improvement					*Excellent*
How well did--						
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

How well did--

	Needs Much Improvement					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishing the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--	*Needs Much Improvement*					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--

	Needs Much Improvement					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

How well did--

	Needs Much Improvement					*Excellent*
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
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FEEDBACK ON TRAINING DESIGN: continued

	Needs Much Improvement					*Excellent*
How well did--						
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishing the behavioral objectives?						
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FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--

	Needs Much Improvement					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

	Needs Much Improvement					*Excellent*
How well did the trainer--						
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

How well did--

	Needs Much Improvement					*Excellent*
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
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terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

How well did--	*Needs Much Improvement*					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishing the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
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8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--	*Needs Much Improvement*					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
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5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--	*Needs Much Improvement*					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

How well did--	*Needs Much Improvement*					*Excellent*
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

	Needs Much Improvement					*Excellent*
How well did--						
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishing the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ______________________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--	*Needs Much Improvement*					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--	*Needs Much Improvement*					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

	Needs Much Improvement					*Excellent*
How well did--						
1. the training goal reflect the training need selected?	**0**	**1**	**2**	**3**	**4**	**5**
2. the behavioral objectives relate to the training goal?	**0**	**1**	**2**	**3**	**4**	**5**
3. the behavioral objectives specify:						
terminal behavior?	**0**	**1**	**2**	**3**	**4**	**5**
criteria?	**0**	**1**	**2**	**3**	**4**	**5**
conditions?	**0**	**1**	**2**	**3**	**4**	**5**
4. Were the behavioral objectives realistic?	**0**	**1**	**2**	**3**	**4**	**5**

FEEDBACK ON TRAINING DESIGN: continued

How well did--

	Needs Much Improvement					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishing the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ____________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--	*Needs Much Improvement*					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--

	Needs Much Improvement					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

MODULE VIII: EVALUATION

PERSPECTIVE

The purpose of this module is to provide information on and give participants practice in developing evaluation measures for training. Evaluation is examined in terms of participant reaction, learning, behavior change, and results. This module includes:

- Overview
- Lecture/Discussion: How to Evaluate Training
- Structured Experience: Designing Evaluation Measures
- Summary

BEHAVIORAL OBJECTIVES

Using information presented in Module VIII as criteria, at the end of this module, and without the aid of notes, participants will be able to:

1. Define the following terms

   reaction
   learning
   behavior change
   results

2. Identify at least one method to evaluate reaction, learning, behavior change, and results

3. Given a training design, develop in writing at least one evaluation measure

MODULE VIII: EVALUATION

OVERVIEW: EVALUATING TRAINING

This module focuses on evaluation measures for training programs. Four elements of evaluation are:

- **Reaction:** *How well did participants like the program?*
- **Learning:** *What principles, facts, and techniques were learned?*
- **Behavior:** *What changes in job behavior resulted from the program?*
- **Results:** *What tangible results did the training have on the treatment program?*

HOW TO EVALUATE TRAINING

Following is an outline of the lecture with space for notes provided.

I. Measuring Participant Reaction to Training (Kirkpatrick, 1967)

A. Measuring trainees' feelings about training; this includes the trainers, the training environment, and the training methodology

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B. Guides for evaluating reaction

1. Determine what you want to find out.

2. Use a form for comments on those items determined above.

3. Design the form so that the reactions can be tabulated and quantified.

4. Make the forms anonymous for more honest reactions.

5. Allow space for additional comments not covered by the questions. (Kirkpatrick, 1967)

6. Design your form to elicit the information you need, whether it is the reaction to the subject matter, to the training techniques, or to the performance of the trainers.

7. Solicit participant reactions at the end of each day as well as at the end of the program.

C. Methods used are verbal feedback sessions and written questionnaires.

1. Questionnaires should be structured so that participants can express their reactions numerically, for example:

Was this session worthwhile? (No) 1-2-3-4-5 (Yes)

Do you think it will help you on your job?
(No) 1-2-3-4-5 (Yes)

2. Include open-ended questions and space for other comments.

II. Measuring Learning

A. Learning can be defined as the principles, facts, and techniques that participants became knowledgeable of as a result of training

B. Guides for evaluating learning

1. The learning of each participant should be measured quantitatively so that results can be determined.
2. Evaluation measures should be given before and after training (pre- and posttests) to demonstrate learning gain.
3. The learning should be measured on an objective (rather than subjective) basis.
4. If possible, a control group should be compared with the group of participants.
5. Results should be analyzed statistically so that learning can be demonstrated through such indicators as correlation or level of confidence.

C. Possible problems with pre- and posttests

1. Participants need to know why tests are given so they won't be afraid of receiving a failing grade.
2. Taking multiple-choice tests is a skill that not everyone knows.
3. Lack of familiarity with the intricacies of English can make understanding difficult.
4. The phrasing of questions must be clear; unclear wording can affect trainees' scores.
5. The training must teach the material to be tested.

D. When using pre- and posttests (Kirkpatrick, 1967)

1. Give pretests to all participants before training.
2. Give them also to a control group, if possible.
3. Analyze pretests in two ways:
    a. Tabulate the total score of each person.
    b. Tabulate the responses to each item in terms of right and wrong answers.
4. A posttest should be given to participants and to the control group.

E. Evaluating skills

1. Specific skills might include interviewing skills, counseling techniques, reading improvement, etc.

2. Examples of activities for evaluation:

   a. Demonstrations

   b. Individual performances of the skill being taught

   c. Debriefing following role play

III. Measuring Behavior Change

A. To benefit from training several conditions must exist (Kirkpatrick, 1967)

  1. The trainee must have an opportunity to put new learning into effect on the job.

  2. He must realize that applying new learning will make his job easier and more efficient.

  3. He must be motivated to improve his job performance.

B. Guides to evaluating behavior change

  1. A systematic appraisal of job performance before and after training should be made.

  2. Appraisal should be made by:

     a. The trainee

     b. His superiors

     c. His subordinates

     d. His peers

  3. Analyze information; compare performance before and after training and relate changes to the training program.

  4. Behavior change should be evaluated one, three, and six months after training.

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5. If possible, a control group should be used.

IV. Measuring Results

Only training programs that have clear, distinguishable and specific results can be evaluated in those terms, for example, those teaching clerical skills, treatment planning, accounting procedures, etc. It is difficult to distinguish the results of other types of training programs because there are so many variables in the work environment.

DESIGNING EVALUATION MEASURES, A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to provide practice in designing evaluation measures.

Description

In your small groups, review the training design developed in Module V and design evaluation tasks to measure reaction, learning, behavior change, and results. Be as creative and realistic as possible. After an hour, return to the large-group room to present your designs to the total group.

Comments

SUMMARY OF MODULE VIII

Use the space below for any notes

REFERENCES

Bloom, B., Hastings, J. T., & Madaus, G. *Handbook on Formative and Summative Evaluation of Student Learning.* New York: McGraw-Hill, 1971.

Kirkpatrick, Donald L. Evaluation of Training. In Robert L. Craig & Lester R. Bittel, (Eds.), *Training and Development Handbook.* New York: McGraw-Hill Book Co., 1967.

Mager, R. F. *Measuring Instructional Intent.* Belmont, California: Fearon, 1973.

EVALUATION BY TRAINERS

New Jersey Community Action Training Institute, *Community Action Training: A Handbook for Trainers*. Trenton: NJCATI, 1968.

EVALUATION BY TRAINERS

After the program, get all the trainers together for a final *Experiencing, Identifying, Analyzing, Generalizing* session. Use all the information you have--the trainers' observations and reactions to the session, the trainees' reactions and recommendations, comments of observers and consultants, any tape recordings of the session and opinions of the trainees' supervisors and the agency (if these are available). Focus on:

What Happened During the Session

1. Look for the same things about the total program that you looked for during the sessions (see p. VI-5).
2. Look for any overall patterns of behavior (by trainers, trainees, or both) that moved things along or slowed them down.
3. For future use, note the things that went well.
4. Review the problems that came up. Figure out ways to avoid them in the future.
5. Leave some time for brainstorming about new ideas.

How the Session Compared with Your Original Plan

1. Do training objectives still seem clear and realistic? Were they appropriate? Did you achieve the objectives? What was especially helpful in achieving them and what hindered achievement?
2. Did the training design work out the way you expected it to? Where did the session not follow the design? Why?
3. Was there enough time for *Experiencing, Identifying, Analyzing, Generalizing*--especially the last three steps (*IAG*). Did people participate? Why or why not?
4. How would you change the design if you had it to do over again? Be specific. What would you include or leave out? What new things would you try?

ON-THE-JOB EVALUATION

The primary aim of a training program is improving people's performance in their work.

1. Ask for reports by trainees of critical incidents in which they believe the training program changed their behavior. This approach to evaluation reinforces the learning. It encourages trainees to continue the *Identifying, Analyzing, Generalizing* process beyond the program and to apply it to their on-the-job experiences.
2. Conduct a follow-up group interview of trainees. Discuss experiences they have had since the training program.
3. Ask for reports by supervisors and other co-workers on whether or not the trainee has in fact improved. The more precisely you define the change you expect, the more you can structure your training session to produce that change.

FOR THE RECORD

Write a report of your evaluation for the training sponsor or for your own file. Include:

1. A short description of your training goals and plan
2. Information on the participants: number, job categories, agency for whom they work
3. Place, dates, and number of hours of training
4. Methods of evaluation
5. Results of evaluation
6. Evaluation of consultants and special materials used
7. Conclusions
8. Recommendations for future training

WORKSHEET: PLANNING FOR EVALUATION

HOW WILL YOU MEASURE--	INSTRUMENT OR PROCESS TO BE USED	WHEN FEEDBACK IS TO BE COLLECTED	HOW/WHEN FEEDBACK IS TO BE USED
1. Trainee prerequisite skills			
2. Trainee understanding of objectives			
3. Trainee achievement of learning tasks			
4. Trainee opinions during course			
5. Trainee achievement of behavioral objectives			
6. Trainee opinions at end of course			
7. Trainee performance back on the job			

QUICK FEEDBACK SHEET

Please answer the following questions by circling the number that comes closest to how you feel right now.

	No, Waste of Time										*Yes, Very Worthwhile*	
1. Do you think this session was worthwhile?	0	1	2	3	4	5	6	7	8	9	10	
	Not At All										*Very Much*	
2. How much do you feel you personally needed this session?	0	1	2	3	4	5	6	7	8	9	10	
	Not At All										*Very Much*	
3. How much do you feel others in the group needed this session?	0	1	2	3	4	5	6	7	8	9	10	
	Poorly										*Very Well*	
4. How well do you think the trainer(s) did his/their job(s)?	0	1	2	3	4	5	6	7	8	9	10	

What did you like most about the session?

What did you like least about it?

Any other comments or suggestions?

PARTICIPANT REACTION SHEET

1. I think this session was

2. During this session I felt

3. I wonder if

4. I learned

5. I think other people in the group

GENERAL EVALUATION OF THE TRAINING PROGRAM

(To be filled out by participants)

1. List five of the program's most important objectives. How close do you think the program came to reaching the objectives you've listed?

2. What parts of the program did you think were useful?

   ( ) All of it

   ( ) Most of it

   ( ) Some of it

   ( ) None of it

   Please comment --

3. Did you get as much out of the program as you expected? Explain why or why not.

4. Were you satisfied with the amount of factual information that was presented in this program? Please comment.

5. Trainees participated to a certain extent in planning the program. Do you think--

( ) trainees should have been more involved in planning it

( ) trainees should have been less involved in planning it

( ) the involvement of trainees in planning the program was about right

Please comment.

6. The program was designed to encourage trainees to share experiences and ideas with each other. Do you feel there was enough opportunity for everyone to do this? Please comment.

7. What problems or dissatisfaction did you have with the way the program was scheduled?

8. If you were to begin the program all over again, how would you want it to be different?

INSERVICE EDUCATION REPORT

DATE: ______________________ TIME: From __________ to __________
(Month) (Day) (Year)

TRAINING COORDINATOR: ______________________________

SPEAKER: ______________________________

TOPIC: ______________________________

____

RESOURCE MATERIALS USED: ______________________________

____

____

MAIN POINTS COVERED: ______________________________

____

____

____

____

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____

____

____

____

(Use back for Attendance)

PARTICIPANTS

NAME	JOB TITLE

Sample Form

FOLLOW-UP EVALUATION

A few weeks ago you took part in a training program. We want to find out just how helpful that training was. Please answer every question, even if you write "I don't know" or "This question doesn't apply to me."

Your answers will help us improve future training sessions. Please take the time to completely answer all the questions.

DATE ____

JOB TITLE ____

Training is effective only if it helps you do a better job. Ask yourself if you have changed the way you do your job.

If you have, try to describe those changes in the space below, for example, something that has happened to you, or something you have done since the training that shows how you have changed.

(If you don't think you've changed at all, please say so. PLEASE DO NOT LEAVE THIS SPACE BLANK--WE WILL THINK YOU MISSED IT.)

FOLLOW-UP EVALUATION continued

1. I feel I understand my job--

( ) less than I did before the training program
( ) about as well as I did before the training program
( ) better than I did before the training

2. I feel I understand my co-workers' jobs--

( ) less than I did before the training
( ) about as well as I did before the training
( ) better than I did before the training

3. Some of the skills a good (counselor, supervisor, etc.) needs are:

4. Some common fears or attitudes that clients have when they first enter treatment are:

5. Some specific things we can do to overcome these fears or attitudes are:

FOLLOW-UP EVALUATION continued

6. In general, I think that I work with new clients--

   ( ) worse than I did before the training
   ( ) about as well as I did before the training
   ( ) better than I did before the training

   Please explain the answer you chose:

7. If asked to, I can explain what I am expected to do on my job--

   ( ) less than I could before the training
   ( ) about as well as I could before the training
   ( ) better than I could before the training

   I would still have some difficulty understanding and explaining:

8. I think our staff communicates with one another and works together--

   ( ) less than it did before the training program
   ( ) about as well as it did before the training
   ( ) better than it did before the training

   Please explain the answer you chose:

EVALUATION AND TRAINING

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Validation Coordinator
National Drug Abuse Training Center

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EVALUATION AND TRAINING

We all know that any kind of training or instruction should be evaluated. However, for various reasons, much training/instruction is never evaluated, assessed, or systematically reviewed.

This paper presents a brief survey of fundamental information on evaluation directed toward those who need basic knowledge about evaluation techniques. It is by no means intended for experienced practitioners.

Following are brief descriptions of some of the more popular evaluation models.

INTRODUCTION

The main purpose of evaluation is to measure the effects of a program. One might, for example, want to determine the degree to which trainees have mastered a given learning task and to identify the parts of that task that have *not* been mastered. This is called *formative evaluation.* On the other hand, one's major concern might be a more general assessment of the degree to which the larger outcomes have been attained. In this situation, one would be more concerned with making judgments about the effectiveness of the overall training. This is called *summative evaluation.*

There are several ways to evaluate a training program, although the usual approach is to measure the effects of the program against its goals and objectives. Comparing effects with the goals and objectives emphasizes the outcomes of the program, and stresses the use of explicit criteria for determining how well the program is doing.

There are two basic ways to measure the effects of a training program: criterion-referenced and norm-referenced measures. A *criterion-referenced measure* compares a trainee's performance to a specific criterion, for example, a specific score on a test, a given number of words to be typed per minute with a specified degree of accuracy, or an ability to operate a given piece of equipment. There is a predetermined standard of acceptable performance.

A *norm-referenced measure* compares an individual's performance to that of a specified group. For example, a trainee's score might be compared to that of trainees who previously took the course or to that of all other trainees of his age group.

MODELS OF EVALUATION

There are several models of evaluation, all or parts of which might be used. Some of the most popular models are discussed below.

Experimental Design

This model uses experimental and control groups. From the target population, individuals are randomly chosen to be either the experimental group, the one that is trained, or the "control group." Each group is tested on knowledge of basic course content or skills before the program starts and after it ends. If the gains (increases from pretest scores to posttest scores) demonstrated by the experimental group are greater than those of the control group, the training program is considered a success.

Time Series Design

This model involves a series of measures (such as urinalysis data) on drug treatment clients, made at periodic intervals before the training program begins, and continued periodically after the program ends. When these measures are plotted on a graph, trends in the data càn be observed. It then becomes possible to determine if a decisive change occurred after training, thus indicating the success of the training.

Multiple Time Series Design

This model is similar to the time series model, with the addition of a "control factor": the same measures that are taken periodically for participants are also taken for a similar group for comparison. The measures are plotted on a graph. In this model, two conditions must be met before success can be attributed to the training program: (1) after training there must be a decisive change indicated for the training group, and (2) there should be no decisive change indicated for the control group.

Nonequivalent Control Group

In this model there is no random assignment to training and control groups as there would be in the true experimental design. Individuals or groups with similar characteristics are used as controls. Nonrandomized controls are generally called "comparison groups." "Before-and-after" measures are taken for both groups and the results are compared. As in the experimental design, if the gains demonstrated by the experimental group are greater than those of the control group, the training program is considered a success.

Before-and-After Model

This model involves testing the trainee group before and after training. The measures usually are in the form of pre- and posttests on the major course content. With various modifications (including the use of quasi-experimental procedures), this is the basic model presently being used by the National Drug Abuse Training Center and by the National Training System. This model need not be limited to pre- and posttest measures. It could include a series of measures for the target population, target sites, and trainees both before and after the training event to evaluate training formatively as well as summatively. An ideal expansion of the simple before-and-after model is outlined below:

"Before" Activities

1. Identify target population to be trained.
2. Conduct task analysis and training needs survey with target population.
3. Tabulate, categorize, and analyze results of task analysis and needs survey.
4. Identify areas of content in which training is needed, based on the results of #3.
5. Develop behavioral objectives for the course.
6. Develop course content and training materials.
7. Develop pretest and posttest and other evaluative instruments.

"During" Activities

1. Initially, present the course in-house to target trainees.
2. Collect pre/posttests, and other evaluative data on all trainees.

"After" Activities

1. Follow-up on trainees when they return to their programs, using self-reported training needs and/or posttraining action plans (which should be obtained from trainees before they leave the course) as a guide for follow-up data collection.

2. Analyze the follow-up data to determine the relationship between end of course (posttest) performance and field (on-job) performance.

3. Establish a criterion performance level for the posttest, based on the results of the analysis.

4. Deliver the training course to target trainees at several different sites in the field, collecting pre/posttests and other evaluative data on all trainees.

5. The training course is considered successful when 70% of the trainees in two successive field deliveries of the course have met the established performance criteria for that course.

The expanded version of the before-and-after models discussed in this outline is a certification type of evaluation. In this respect, it would be more accurate to call it *training system validation*, which is one of the many kinds of evaluation.

The models we have discussed represent some of the basic ways in which training might be evaluated. Again, there are many ways to evaluate a training event that have not been discussed in this paper. A list of references that are relevant to evaluation follows for the convenience of those who wish to investigate evaluation theories and methods further.

LIST OF RESOURCES

Bloom, B., Hastings, J. T., & Madaus, G. *Handbook on Formative and Summative Evaluation of Student Learning.* New York: McGraw-Hill, 1971.

Craig, R., & Bittel, L. (Ed.) *Training and Development Handbook.* New York: McGraw-Hill, 1967.

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Popham, J. *Criterion-Referenced Measurement.* New Jersey: Educational Technology Publications, 1971.

Thorndike, R. L. (Ed.) *Educational Measurement (2nd Edition).* Washington, D. C.:American Council on Education, 1971.

Tracey, W. *Designing Training and Development Systems.* U.S.A.: American Management Association, 1971.

Weiss, C. *Evaluation Research.* New Jersey: Prentice-Hall, 1972.

MODULE IX: TRAINER INTERVENTIONS*

PERSPECTIVE

The purpose of this module is to provide information on trainer interventions and give participants an opportunity to practice and to analyze those interventions critically. This module includes:

- Overview
- Lecture/Discussion: Trainer Interventions
- Structured Experience: Identifying Interventions
- Structured Experience: Making Interventions
- Summary

BEHAVIORAL OBJECTIVES

Using the information presented in Module IX as criteria, at the end of this module participants will be able to:

1. Identify at least three interventions made by trainers to facilitate a training group's work on a task
2. Identify at least three interventions made by a trainer to create a more productive climate for learning
3. Demonstrate at least one appropriate intervention to facilitate the work of a small group

---

*The original work on this module was done by Beth Jacobs Gillispie.

MODULE IX TRAINER INTERVENTIONS

OVERVIEW

TRAINER INTERVENTIONS

Following is an outline of the lecture with space for notes.

I. What Is An Intervention?

An intervention is an interruption of an ongoing training activity that influences the direction, content, behavior, and/or affect in a group.

II. Why and When Should a Trainer Intervene?

A. To help a group become more productive

B. To speed up a task

C. To maintain the balance in an interdependent group (refer to "Stages of Group Growth," p. III-3)

D. For the following reasons:

1. To maintain the group process as it relates to the *task*

2. To maintain the group process as it relates to the group's *climate*

III. Trainer-Group Agreement

A. Before the intervention the trainer and group should agree on the goals of the group

B. They should agree on group norms involving

1. Trainer role(s)

2. Participants' role(s)

3. Feedback rules

4. Confidentiality

5. Time constraints

6. Environment (smoking, room temperature, visitors, etc.)

IV. Interventions Worksheet

A. Helps trainer break down group process to analyze why a particular behavior is occurring

B. Terms on the worksheet

1. Indicator: signal that something needs changing

2. Affect: trainer's interpretation of the mood that goes with the indicator

3. Source: what the cause of the affect seems to be, for example

a. The trainer

b. The trainee

c. The environment

d. The content

V. Task and Climate Interventions

A. Examples of task interventions

1. Clarify goal(s)
2. Suggest a division of labor for tasks needed to complete job
3. Observe how much time is left, or, if the group members didn't budget their time, suggest they do
4. Review critical issues and/or decisions the group faces
5. Identify resources that might be useful
6. Remind group members of why they need to complete their task, e.q., to get an earlier break or to be ready for the next step
7. Diagram or write out what has been spoken to provide clarity and/or focus
8. Offer an analysis, summary, and/or clarification of material that has been covered so far

B. Examples of climate interventions

1. Offer humor to ease tension
2. Be silent to build tension or encourage group participation

3. Make personal disclosures to bring out trainees' attitudes and feelings

4. Be sensitive to verbal and nonverbal climate

5. Ask open-ended questions for clarification

6. Provide a direct blunt report to help group members recognize what is happening in the group (Data should be given to back up information.)

7. Tell a story or analogy to illustrate a point

8. Move from a question to an exercise to intensify climate

Sample Form

INTERVENTIONS WORKSHEET

INDICATOR (Trainee Behavior)	AFFECT (Trainer's Assumption)	SOURCE				YES or NO	INTERVENTION
		TRAINER	TRAINEE	ENVIRONMENT	CONTENT		
						STOP HERE *To intervene or not?*	

INTERVENTIONS WORKSHEET EXAMPLE

INDICATOR (Trainee Behavior)	AFFECT (Trainer's Assumption)	SOURCE				YES or NO	INTERVENTION
		TRAINER	TRAINEE	ENVIRONMENT	CONTENT		
Trainee is staring out window	*Boredom*	*Trainer is being too wordy and unclear*				*To intervene or not?* STOP HERE	
Trainee is staring out window	*Excitement*			*Someone is streaking outside the training room*			
Trainee is staring out window	*Disgust*		*Trainee is talking again*				
Trainee is staring out window	*Fatigue*		*Trainee went to bed at 4:00 AM*				
Trainee is staring out window	*Boredom*				*Material is too technical and complex*		

SHALL I MAKE THE INTERVENTION?

Before making the intervention, ask yourself these questions:

1. Have I examined my assumptions about why the indicator (trainee behavior) occurred?
2. What is the purpose of the intervention--what do I want it to accomplish? Is it relevant to the learning task?
3. Is it low risk or high risk? Does it have a chance of succeeding?
4. Is the timing appropriate for what's going on?
5. Does it fit my training style--will it succeed?
6. Is the intervention congruent (in harmony) with the ground rules we've agreed upon?

"IDENTIFYING INTERVENTIONS," A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to learn about various interventions.

Description

Small groups will be given a situation that occurs in most training sessions. Your task, as a group, is to decide on the appropriate interventions. Use the "Shall I Make An Intervention?" Sheet as a guide.

Comments

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CASE SITUATIONS

1. You are in the middle of a training session. John Green comes in late again and starts asking questions. This is the second day of the course and he has done this three different times. No one has chastised him up to this time.

2. William Silent has not spoken in the large group for two-and-a-half days except to answer questions addressed to him. You have observed that, although he participates in his small group, he speaks less than any of the other members. What would you do?

"MAKING INTERVENTIONS," A STRUCTURED EXPERIENCE

Goal

The goal of this structured experience is to practice making appropriate interventions.

Description

Small groups will work on creating a structured experience to achieve the learning task outlined in their manual. Members should make interventions as appropriate, to keep the group on the task and to assure a productive climate.

Comments

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CASE SITUATION

Learning Task

To learn how each trainee exhibits behavior that could hinder communication

Refer to TAS FIVE, p. IV-5, in your manual.

This learning task follows those previously identified in your training design.

You will be conducting this training session for twenty participants. Create your structured experience.

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MODULE IX TRAINER INTERVENTIONS

SUMMARY

Use the space below for notes.

DIMENSIONS OF LEADERSHIP*

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* Adapted from Lassey, William R., "Dimensions of Leadership," in Lassey, William R. and Fernandez, Richard R. *Leadership and Social Change.* University Associates, La Jolla, California, 1971.

DIMENSIONS OF LEADERSHIP

NONFUNCTIONAL BEHAVIOR

Some participants in groups regularly deter achievement. The more common types of nonfunctional behavior include:

Aggression: working for status by criticizing or blaming others; showing hostility against the group or an individual; deflating the ego or status of others

Blocking: interfering with the progress of the group by intentionally deviating from the subject of discussion; citing personal experiences unrelated to the problem; rejecting ideas without consideration; and arguing excessively

Self-confessing: using the group as a sounding board; expressing inappropriate personal feelings or points of view that are not group oriented

Competing: vying with others to produce the best ideas, to talk the most, to play the most roles, to gain the leader's favor

Seeking sympathy: trying to gain group members' sympathy to one's problems or misfortunes; deploring one's own ideas to gain support

Special pleading: introducing, or supporting suggestions related to personal concerns or philosophies; lobbying

Horsing around: clowning; joking; mimicking; disrupting the work of the group

Recognition seeking: attempting to call attention to one's self by loud or excessive talking, extreme ideas, or unusual behavior

Withdrawing: acting indifferently or passively; resorting to excessive formality; daydreaming; doodling; whispering to others; wandering from the subject

A clear understanding of behaviors that help or deter achievement facilitates improved performance of the leadership role and increased effectiveness of groups, organizations, and communities.

AUTHORITY AND POWER

Individuals achieve positions of leadership for a variety of reasons. For example, an individual (1) may be recognized by superiors or colleagues as having leadership potential; (2) may have inherited a leadership role; (3) may assume the role by default because no one else is available or willing to perform its functions; or (4) may use physical or economic force to achieve a leadership role.

The processes through which a "leader" achieves authority or power vary widely, depending on the leadership context and on the norms of desirable leadership behavior in the group, organization, or community. Behavior considered highly desirable by a street gang may be totally unacceptable in a civic club.

A leader vested with authority and power necessarily takes on greater "psychological size" than other members of a group, organization, or community. This is partially due to:

Individual Attitudes Toward Authority

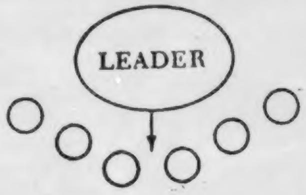
These are conditioned by life experiences, beginning with behavior exhibited by the mother and father. Later, other persons who control one's behavior and distribute rewards and punishments affect one's attitudes toward authority. Those in control assume the aspect of power: they appear physically and psychologically larger than oneself. These feelings and attitudes toward authority may later be projected to other leaders.

Individual Needs for Security

Some individuals prefer a leader who appears powerful. They want protection or are fearful of taking responsibility for themselves. Therefore, the more important the leader is perceived to be, the greater his role as protector appears, and the higher his status in the group.

The powerful leader may encounter several basic types of reactions from the group.

Dependency - Members demonstrate submissiveness or willingness to go along with the leader's proposals.



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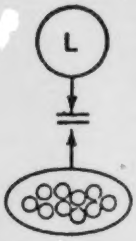
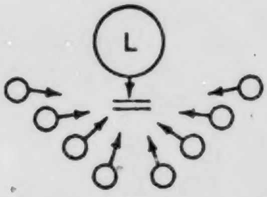
Counterdependency - Members demonstrate reactive, opposing, or resisting behavior of two types: (a) individual opposition, or (b) organized opposition--often typified by labor-management or student-faculty relationships.



Organized Opposition



Individual Opposition

Dependent reactions are related to a desire for security. Counterdependent reactions may be related to perceived leader inadequacies, task difficulties, or individual attitudes toward authority. Most groups and organizations contain both dependent and counterdependent members. A group may change from being predominantly dependent to counterdependent. An individual may be ambivalent toward powerful leaders and display both reactions; he may need their direction and protection and yet resent their power over him.

Interdependence - If the authority problem is resolved, the leader will be evaluated more realistically. If the difference in psychological size between the individual and the leader is minimal, mutual respect is likely to increase. The individual becomes interdependent in his relationship with the leader; and a more collaborative, democratic process evolves.

SUMMARY

Definitions of leadership abound. There is no clearcut agreement on the meaning of leadership for all circumstances. Leadership can probably best be understood by carefully studying specific roles and behaviors. Effective management of functional and nonfunctional behavior plays an important role in the leader's achievement of authority, power, and effectiveness. Leadership is subject to study and refinement and, presumably, can be learned through systematic acquisition of appropriate knowledge and skills.

"KILL THE TRAINER"

"KILL THE TRAINER"

In training groups some members may exhibit negative, resisting behavior, opposing the trainer in a struggle for group dominance. This rebelliousness is often labelled as counterdependent behavior or is more familiarly called "Kill (or get) the trainer."

There are certain things trainers do that may cause a "trainee revolt." If a trainer expects rebellious behavior as a natural part of the training process, his expectation will probably be realized. If he assumes an authoritarian attitude and shows disdain for the group, acts superior to the group, or verbally and nonverbally asserts his expertise (he is always right; the group is wrong and doesn't listen), trainees will rebel. If he is tired, under a lot of stress, and manipulates the group to meet his needs without consideration of theirs, rebellion will occur. If trainers fight among themselves, the group will be fragmented, perhaps causing rebellious behavior. If he doesn't explain what the course is about or clarify participant expectations, most trainees will feel dissatisfied and frustrated. They will also feel disillusioned, that material has been misrepresented.

By virtue of his position, the trainer is viewed as a person of authority and power: he assumes a greater "psychological size" than other group members. The psychologically larger leader encounters two basic types of reactions from group members: dependency (submissiveness) and counterdependency (reactive, opposing behavior). Most groups are made up of both dependent and counterdependent members, and tendencies toward either reaction may exist in individuals, allowing the group to change in either direction (Lassey, 1976).

Generally this behavior occurs during the second phase of group development as members are struggling with *Organizing to get work done/Intragroup conflict*. Participants bring many unresolved conflicts concerning authority, dependence, rules, and agenda to a new situation; therefore, the issues that emerge during this phase reflect interpersonal conflict over leadership, power, and authority. The actions and attitudes of trainers can contribute to these conflicts, promoting behavior that may be interpreted as resisting and opposing.

A certain amount of questioning, manipulating, and opposing behavior is expected within any group. People want to find out about the group. Can it meet my needs? How can I make that happen? Will I be recognized, respected, and valued? Will I be listened to? Will I be heard? People need to test their own power and that of others in the group, to test the ground rules and the sanctions. Behaviors exhibited by participants in response to these issues vary according to the participant's gender, culture, personality structure, urban/rural regional style, and type of training group.

When these behaviors occur it is important that the trainer avoid being manipulated into self-defeating behaviors. He should not assume the role of parent or authoritarian expert. Fighting with participants about an issue, chasing after a participant who walks out of the group, becoming defensive, are all behaviors to avoid. When these behaviors occur, the trainer should try to identify what is happening. He should not assume that an issue is invalid simply because a trainee raised it during this period of time. He must work with the group to explore the issue(s) in question. Sometimes training cannot progress unless issues are dealt with at the moment they occur; at other times the group may be able to proceed with the training, setting aside time later in the session to deal with the issue. In working through a trainee revolt a trainer should remember that:

1) He does not have to respond to every statement, issue, or question.

2) Unless his behavior has been really obnoxious, many group members will offer alternative points of view that support the training and trainer's position. The trainer should let group members express themselves and explore the issues. The group can be trusted to find a reasonable resolution.

3) He should acknowledge his contribution to the problem. Trainers are people; they make mistakes, too.

4) He should keep the training objectives in mind and remain open to the opinions of others. Flexibility should be maintained within the constraints of the training goals and objectives. But trainees should be reminded that the trainer's job is to conduct this training course and if the course doesn't meet their needs, they are free to leave.

ACCELERATING PARTICIPANT LEARNING*

Samuel A. Culbert

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ACCELERATING PARTICIPANT LEARNING

A Continuing Challenge in Trainer Intervention*

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Much of my professional time since the mid-1960's has been devoted to training group trainers. This work has increased my awareness of differences in trainer styles, values, and theories of learning. Moreover, it has alerted me to the things I do as a trainer, to my thoughts about training and about others who are coming into this profession, and in particular, to the characteristics that distinguish my style from that of others. In this chapter, I articulate some of my unique characteristics with openness and candor in the hope that my comments will stimulate others to dialogue.

In a recent paper about trainer intervention (Culbert 1970), I provided a model for accelerating group learning which is broad enough so that any trainer can superimpose on it his theories about how people learn and his techniques for helping them do so. This model contains five assumptions.

1. Trainers *can* through their participation accelerate the natural learning processes of training groups.
2. The ultimate goals of a training group are not immediately attainable.
3. Experienced trainers can predict the paths for reaching these ultimate goals in spite of revisions which must be made as group events unfold.
4. Trainer predictions (whether explicit or implicit) usually have a directive impact on the group's process.
5. Guidelines for the trainer's participation derive from attention to those issues which a particular phase of the group's development is contributing to the accomplishment of the group's ultimate objectives.

In the paper mentioned above, the discussion of this model emphasized what the trainer may systematically do to guide his group's existence. The present chapter contains some of the specific methodologies which I use when working with the model, the rationales for my behavior, and my thoughts about the moment-to-moment participation issues a trainer faces. These issues are grouped into three categories: (1) the unique responsibilities of the trainer role; (2) the singular opportunities of a trainer for influencing others; (3) and the human demands of participation as a trainer in a group.

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* Special thanks to David R. Peters for his helpful comments on an earlier draft of this chapter.

ISSUES FACING GROUP TRAINERS
RESPONSIBILITIES OF THE TRAINER ROLE

By responsibilities, I refer to the obligations for performance attached to the trainer role as the result of the expectations of others, of expert knowledge, or of self-expectation.

Responsibilities resulting from the expectations of others. Issue: Can the trainer role be diminished to that of model group member?

An assumption I would like to erase is that the trainer is just another participant. Many contend that a trainer is simply a more experienced group member or the best group participant. In reality, while he is both of these, he also has some unique responsibilities.

Certainly the trainer is a model, whether by his own intent or because others who are in the process of trying to discover guidelines for their participation in the group will see him that way. Participants will expect him to be someone who has successfully dealt with many of the struggles currently confronting them in the group. And in all likelihood, the trainer will also see himself this way. Moreover, participants will quickly observe that when the "votes" are tabulated, the trainer has voted more than once, he is a power figure and others will seek to gain similar power by supporting his views.

I believe, however, that it is the trainer's struggles, not his successes, and the ways he deals with intrapersonal and interpersonal dilemmas, not his solutions to them, that give him what singular value he has as a model. For example, a while ago I had the experience of listening to a participant tell of a struggle that was causing him considerable pain. Since I felt deeply with him, I decided that I would share something parallel that I had struggled with a few years earlier. His reaction was indeed a lesson for me: "Hot dog for you, Sam. You got over yours. What does that do for me?"

Modeling is an unfortunate term because it can imply that something about the trainer's behavior is a performance for others to replicate. I use the term to mean that a trainer can use his real and natural interactions, with the existential outcomes, to illustrate the potentialities of certain kinds of behaviors and relationships.

Responsibilities resulting from the trainer's expert knowledge. There are a number of responsibilities which should be assumed by the trainer when no one else in the group has thought--or has expertise--to pursue them. Sketched below are ten which the trainer might be uniquely qualified to handle.

A trainer is responsible for keeping participants aware of what is happening. The trainer should provide a road map, relating here-and-now activities to group goals in order to assist participants when they get lost. For practical purposes, people are nonparticipants when they are confused or when their thoughts are drifting to something else. Before a group begins, I ask participants to let the rest of us know if they become lost, mentioning that in this way we all have a chance to reexamine group focus and its usefulness to our learning. At the trainer level, I thus have an opportunity to admit I am also lost or to highlight group process and to communicate a broader understanding of its potential than new participants can recognize by themselves.

A trainer is responsible for developing group norms consistent with his learning theories. The norms of trust, exposure of differences, and exchanging of perceptions are among those which lead participants to see blind spots and to experiment with new behavior.

A norm I try to support is that participants share their personal needs when they ask someone else to change. For example, let us suppose that group members confront a silent person about his nonparticipation. If formulated in terms of a "should"--every responsible member should voice his views--the whole group is in danger of missing a very important learning: "Why do the confronting members need the quiet one to speak?" The group can simply decide that the quiet one is trying to manipulate the group, demanding visibility and support by means of his silence. However, this conclusion limits the learning for everyone. Confronting members often do not really face the anxieties the silence creates. They may fear it masks criticism. They may be motivated by their own needs for inclusion and acceptance to form a group norm that everyone must participate. They may be volunteering someone for attention to keep the focus off themselves. For his part, the silent person never really gets beyond the interpersonal patterns that have characterized his everyday relationships. He does not discover the extent of the control he exercises, the power he can have without silence, or the rich opportunities for interpersonal connections that systematically fall beyond his reach. All these learnings become possibilities when a group norm obligates participants to share their own needs in asking someone else to change.

A trainer is responsible for providing accurate perspective for the feedback received by participants. The trainer should balance hostility with warmth and support with confrontation. For instance, when someone is receiving a great deal of critical feedback from three or four vocal group members, he often loses perspective about just how widespread the criticism is. When I think this is happening, I point out to the group that this person is acting as if everyone were critical of him; I thus give others who may feel differently a chance to voice their feelings. Even when a group is unanimous in criticism, I try to introduce multiple perspectives by asking participants to express that self-information which reflects the unique problem posed for *them* by this "objectionable" characteristic. Failure to provide an accurate perspective can lead to eventual resentment of the group by the criticized participant as he gathers more accurate information from his relationships with others outside the group.

There is a special variation of this responsibility that trainers must keep in mind when sharing their own feelings. Most participants think of their expression of feelings as revealing very intense matters. Trainers are more used to expressing feelings, even subtle ones. They frequently overstate or speculate about feelings to teach a participant something. A trainer should be careful to point out when his purpose is didactic, and he should qualify overstated feelings by such remarks as, "I'm only 20 percent annoyed." Because the trainer is a power figure, failure to qualify the degree of his emotional expression can be intimidating.

A trainer is responsible for keeping the tension level of the group at an optimum level for learning. Research has clearly demonstrated that tension bears a curvalinear relationship to learning and, I would add, to relationship-building. Too little tension leaves participants uninvolved and disengaged; too much polarizes them and cuts off communication among them. A technique that I frequently use for raising or lowering group tension levels is to spend time helping participants sharpen their statements to one another. For instance, after silence someone might say, "For the first time I felt good about one of our silences." When I want to raise tension levels, I ask the participant to say more about why this silence differs from previous ones. This can help make him aware of the sources of his tension. When I want to reduce the tension, I ask him to say more about what is contributing to his comfort.

A trainer is responsible for lending his vitality to a group. Experience-based learning is a very demanding process which requires more momentum than is usually needed in order to overcome the barriers to personal learning. If this were not so, this type of learning would occur much more frequently than it does in our daily routines. The trainer's aptitude for spotting learning opportunities and his experience in generating excitement over the possible results of these opportunities provide him with a bank of vitality which he can lend to the group. Of course, there are key moments when group members need to experience their lack of energy in order to develop their *own* momentum; the best contribution the trainer can offer at these times is his silence.

A trainer is responsible for acting as referee from time to time. Frequently a trainer sees members going back-and-forth with statements such as, "You did this. . . ." "No, I didn't. You merely see it that way because. . . ." At some point the trainer can save the group a lot of time and frustration by asking for data and helping to produce it and by setting up rules for talking, such as the common, "I think you could hear one another better if you used 'I' instead of 'we.'" He can also provide perspective with a statement of the following type: "You're so wound up with one another that I don't think either of you is going to get through. Why doesn't each of you pick someone else who knows what you're trying to say and ask them communicate for you?"

A trainer is responsible for providing opportunities for group members to work on the centrally important theme of relations with authority or power. Everyone comes to a group with problems about authority, power, receptiveness to influence, and the like. Authority and power struggles are born early in a person's life and take a long time to resolve. They usually have numerous daily consequences. An important, omnipresent dimension of a training group is that it gives participants a chance to do further work on these issues. It presents a powerful format for attacking them, and the trainer is the key to this process. In contrast to daily encounters with authority where open expression of conflicts usually knocks a participant out of dialogue with the person in authority, the trainer remains in dialogue with each participant over a period of time. Participants, then, can use their relationships with the trainer either for diagnosis or for experimentation with new behavior. Most often this requires interacting with the trainer's masculine side: the part of him which is intellectual, challenging, directive, personally assertive, or willing to fight openly. Unfortunately, despite the preponderance of male trainers, only a minority seem to train with their masculine sides salient. Most interpret the trainer role as predominantly feminine--even maternal --interacting by giving support, nurture, responsiveness, guidance, or reasonableness.

A trainer is responsible for identifying and helping break up group games which interfere with learning. This is a very difficult challenge for a new trainer since these games are often organized around one of his weak sides. Groups can subconsciously sense a trainer's idiosyncrasies and play on them to get control of a situation. A group game to which new trainers are especially vulnerable is the unconscious collusion to protect the image of the leader as strong and knowledgeable. Casting the trainer in this role supposedly provides security to group members. Of course, there are many collusions which group members enter into to protect their own weak sides, but these are usually easier for the trainer to spot and interrupt.

Following are two examples of group collusion which I encountered when observing new trainers.

1. The group talked as though they had established a very warm atmosphere, but there was no apparent reason for it. My first thought was that whatever produced the warmth the members were alluding to had taken place at an earlier session that I had not observed. Then, however, the conversation veered away from an opportunity for two participants to appropriately recognize their appreciation for one another. No one objected when the subject was shifted suddenly to another subject which produced a seemingly warm interchange among the participants. Later the trainer and I discussed his own personal problems with intimacy and after some time we concluded that his group was mirroring these problems. They were giving the illusion of intimacy and depth as a defense against their anxiety in

displaying the caring and vulnerability required for achieving real intimacy.

2. The trainer was very aware of my presence as a consultant, despite our having discussed the possibility of this awareness before the group. He was very concerned with impressing me, and my own needs unconsciously reinforced this concern. The training session produced no beneficial results. Participants were slow and quiet and refused to build upon one another's comments. The trainer reacted to this by becoming increasingly active; he singlehandedly was trying to be the group. The session ended in frustration for everyone; for the trainer because of his performance, and for the participants because of their inability to capitalize on the leadership "offered" them. In my subsequent discussion with the trainer, we posited another strategy. He could have helped generate another kind of process and smoked out live issues by saying to the group, "There doesn't seem to be much happening tonight. Are there any reasons why we just don't knock off?"

In asserting the trainer's responsibility for breaking up group games, I am not advocating that he enter and save the group whenever things are not proceeding well. Part of participant's learning is in learning to shape the group process around themselves. In my thinking, however, the trainer has responsibility for contributing his assessment of interaction patterns--even when letting the group members "do it themselves." The group may or may not be able to use these contributions, but it is helpful if members see the trainer as pitching in rather than as sitting back passively. For example, in moments of group malaise, the trainer should be searching his silence for ways to help, even if this means telling the group that he has been thinking for the last fifteen minutes about what to do but has not been able to come up with anything.

A trainer is responsible for helping participants separate diagnosis from a mandate for change. Realizing the existence of a problem does not necessarily reveal its solution. Group members often react angrily when the trainer points out something they know to be true but which they do not like about themselves, although the trainer's motivation for telling them may have been constructive. In such cases, it is likely that members project upon the statements a stronger criticism than was probably intended. Any criticism may actually be about their ineffectiveness in getting what they want for themselves or about the problems their behavior creates in a relationship with them. The members, however, feeling inadequate because they cannot immediately change, are self-critical and thus defensive.

The trainer can perform a beneficial service to group members merely by finding support for them against their own self-criticism. Participants need to discover that there are good reasons for the difficulties they have in changing. The trainer can help with this by asking a participant to repeat his description of the criticized characteristic so that the other participants can see it clearly. Typically this reveals problems in the accuracy with which the participant sees himself and underscores any gaps in his understanding of his motivations.

Since is is usually the narrowness of the insight that has blocked previous attempts to change, separating diagnosis from change usually makes available behavior alternatives. In such situations, the trainer is dealing with a real-self/ideal-self discrepancy. The participant is frustrated because his behavior is not more like his ideal of how it "should" be. A more accurate real-self picture usually reveals "good" reasons why the participant behaves the way he does and, in the process, confronts unrealistic aspects of the ideal-self image. The anxiety aroused by too large a gap between real- and ideal-self images is reduced. Thus, providing an accurate real-self picture often leads participants to greater self-acceptance and frees them to change, or not to change, their behavior.

A trainer is responsible for helping a participant separate the positive, goal-congruent aspects of his behavior from those aspects which are viewed negatively by others and which cause him to want to change. Group members frequently experience the feeling that they are being asked to change a favorite quality, even though they cannot quite articulate what they like about it. When dealing with so-called normals, the trainer must remember that there are adaptive aspects of all behavior and that these aspects must be considered lest the person being asked to change feel a sense of personal loss. Separating the adaptive from the maladaptive, however, is not a task that the trainer can count on other group members (with dynamic and complex links with one another) to perform.

For instance, a participant's aggressive behavior when angry can block the expression of others. Given a choice, the aggressive participant probably does not want to do this. On the other hand, the angry behavior also has useful aspects for him, such as allowing him to release tension and freeing him to be a more interesting companion for others. The message, "Stop being so aggressive," needs to be received with greater precision; the message is not just "Stop being aggressive," but also "Stop violating my boundaries with your aggressiveness." The challenge to the trainer is to manage, when possible, the following process: (1) Make the consequences for the person objecting to the aggressive behavior more apparent to the aggressive person; (2) Get the aggressive person to state his values about these consequences (the reactions of the objector) without losing his sense of the adaptive aspects of the aggression; and (3) Get both to collaborate in modifying the troublesome aspects of the aggressive person's behavior. When accomplished, this kind of collaboration can lead to deep expressions of warmth as each person in the conflict experiences from the other respect for and support in the dilemma. The objector gains the understanding and respect of the aggressive person for the problems he is experiencing with him, and the aggressor gains support in his ability to change his behavior without giving up some aspects which are valuable to him.

Responsibilities resulting from a trainer's self-expectation. Issue: Must the trainer require participants to accept as a matter of faith his assumptions about the kinds of behavior that produce learning?

My response to this issue is a resounding "no"--of course tempered in practice by my limitations in articulating training-group processes and by my own behavior as a critical part of those learning processes. I strongly believe that the most central value of the training-group process is that participants learn how they have learned. In fact, my ultimate objective as a trainer is to teach participants how to produce similar learnings in their daily activities. (I will go into this more fully in a later section of this paper.) This objective is hard to gain when the trainer takes the nondisclosing role of guru. To the extent that the trainer is either not articulate or is unwilling to discuss his assumptions, he is subtly building up his own charisma at the expense of participant learning. On the other hand, some trainers believe that immediate solutions to problems, transcendental experiences, and exploration of the depths of interpersonal connections in the group are the most important outcomes of a training group; these trainers can make good use of the role of guru-trainer to produce such outcomes.

Early in a group, participants frequently require more informational support than the trainer can usefully impart. For one thing, participant needs for information are usually based on emotions which they do not want to admit. Thus, these feelings are not easily engaged. At such points, the trainer may seek to engender confidence in his own abilities in lieu of information. I believe, however, that even under these circumstances it is better for the trainer to build confidence in himself by means of an in-the-group track record than by relying on prestige or status brought from out-of-the-group activities.

For the trainer to discuss his assumptions about learning-producing behavior gives each participant more responsibility for group process as well as for his own behavior. It challenges each person to be the architect of his own learning and to involve others as they are relevant to this process. Not being encumbered by the expectation that he will manage each participant's learning frees the trainer for data-producing and integrating roles which only he can fill.

Participant responsibility is not possible when the trainer makes a statement that interprets behavior without revealing his data, when he picks at words rather than reciprocally engages participants, or when he supports and feeds transference rather than clarifies group preceptions of himself as a person. In addressing this issue, I make a point of sharing my data with a group by replacing "Somehow I get the feeling that. . .," with "Let me share. . ." interventions and statements of the reasons for a particular sharing.

There are some other obvious benefits that accrue personally to trainers who attempt to make their assumptions public. These trainers get immediate feedback about the accuracy of their theories and the usefulness of their interventions, with implicit suggestions for modifications. They also learn by being asked questions to which they do not yet know the answers. By making assumptions public, trainers also can learn while demonstrating the experience-based methodologies of data collection and analysis, while experimenting with new behavior, and while generalizing from new learnings to modify related theories.

Issue: To what extent must participant learnings be made explicit?

Learning must be made explicit to a considerable extent. An important trainer responsibility is to arrange impromptu examinations of what the learning participants indicate (often without words) they experience. In dealing with personal learning, people can hedge on their intentions to change unless they publicly put their learnings into words. Verbalization and public acknowledgement seem to serve three major purposes: (1) They press the learner to address gaps in conceptualization which cause him to be tentative about that which he already knows; (2) They produce a concrete expression of the learner's commitment to act to which he can later refer as a bench mark for evaluating his behavior; (3) They elicit support from others in unlocking the learner from old patterns which are discrepant with his new desires for participation.

Explicit statements of participant learning are also valuable to the trainer. I am often surprised to find that the meaning of a group experience for a participant is not what I had assumed. As a trainer, I feel an obligation not to brainwash people to see things differently than they do. Explicit expression allows both participants and me to be aware of our differences and to recognize subsequent opportunities for data collection which are relevant to dialogue and mutual understanding.

Certainly there are rich implicit learnings that defy description and that in some cases would be diminished by discussion. Such learnings center around expressions of intimacy. I call such experiences "existentially pure." With the passage of time, however, people become less vulnerable when talking about these experiences, so that we can learn from them without violating their memory. I jokingly tell participants my main commitment is to a "learn-in," not a "love-in."

OPPORTUNITIES OF A TRAINER FOR INFLUENCING OTHERS

I have already mentioned that the trainer gets more than one "vote" in the democratic processes of the training group.* Even if the trainer leaves the room, some participants in the group are guessing how he would "vote" if he were present. This is a fact no matter how much a specific trainer might protest.

Issue: Should the trainer strongly influence a training group's climate in terms of his own preferred style for group interaction? The trainer should decidedly influence a group's climate, as long as his preferred style provides enough latitude so that participants can learn using variations suited to the ways they learn best.

Group training is still an art. For practical purposes this means that different trainers can achieve similar results by doing things in their own individual ways. Each trainer has his own theories of how people learn and how he can best contribute to these learnings. While all of us have a tendency to state our theories as if they were equally valid for others, we privately acknowledge that, in part, our theories are formal justification for our doing the thing we uniquely do best. It is in the participants' best interests for the trainer, when necessary, to structure the group so that he can employ his best style. Without detracting from the validity of this assumption, I have also learned from my work with interns and my research (Culbert 1968) that most trainers have a far greater range of participation styles than they typically express. Accordingly, I both encourage new trainers to do what they feel they do best and also to experiment with new ways of accomplishing their training-group objectives.

As an example, I would like to mention one of the things which I do well in a training group. I use my own personal involvement in the group process as a key means of illustrating data which are critical to diagnosis and problem identification. Typically I am after data that are not quite at the level of group consciousness so that they could not easily be brought to the surface by others. I begin by engaging the participants (or the group if my hunch is at the level of group process) on the dilemmas with which their behavior faces me or the feelings they stir up in me. The purpose is to get myself involved in an interaction in which I experience the behavior I want to comment about. In the process, I am a rather open participant and am very responsive to discussing "my piece of the action." It has been commented that there are real "handles" on me if someone wants to get back at me as a way of discharging his defensiveness.

When the critical data have been made visible in my interaction and my feelings as well as those of the person or persons I was addressing are at a point of at least temporary resolution, I invite the others in the group into the conversation. With the data more evident, they are able to be more articulate about similar issues they have been experiencing with the person with whom I was involved or with others in the group. I conclude my participation by conceptualizing the data I observed both in my interaction and in the subsequent comments of others and then try to complete the bridges to others who could have been involved but have not yet participated. Although I intend this kind of participation for diagnostic purposes, it frequently stimulates a learning process by producing a disequilibrium between the behavior the participant wants to change and the anxiety which was previously kept under wraps by this behavior.

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* I learned this most vividly from Leland Bradford, former head of the NTL Institute for Applied Behavioral Science. How it delighted me to hear him say during an NTL Central Office Staff meeting, "I cast one very strong vote for...."

Intentionally structuring a training group to support the trainer's unique style is a process which requires constant introspection if the trainer is to remain effective. There is always a risk that the focus will be more on the trainer's needs than on those of the participants. The opportunities to attain professional effectiveness while fulfilling personal needs makes the trainer role an unusually attractive one. Those who fill it have a context for centrality, self-disclosure, influencing and helping others, having their sensitivities appreciated, demonstrating effectiveness as a person, being seen as sexually attractive, and so on. While many such expressions can be satisfied simultaneously with participant growth and learning, some block the participants. I have never yet observed a trainer whose needs did not occasionally get in the way of other people's learning. The challenge here is for the trainer himself to be an open system with means for monitoring his actions, for assessing their consequences for others, and for changing his training behavior when appropriate. Flexibility--the ability to change within the group--is more often than not contingent upon the trainer's ability to find ways of fulfilling the same needs outside the group. All trainers confront this problem to some extent.

Just as individual trainers have their own styles (albeit some less effective than others) for facilitating group learning, participants too have styles which characterize the conditions under which they learn best. For example, given alternatives, some people prefer aggressive interaction and others require a group climate of considerable support. While some day we may know enough about learnings and training styles to form optimum matches, today we have to content ourselves with finding trainers whose styles, regardless of specific characteristics, provide enough freedom so that participants can learn in the individual ways which are best suited to them.

The key characteristics in providing participants with this kind of freedom are breadth of trainer repertoire and personal willingness to try different alternatives. This does not mean that the trainer need be all things to all people--only that he exercise flexibility and a willingness to try different types of interventions and to work within climates that are codetermined by participant needs. For example, I recently tried a variety of interventions in an attempt to help a participant get beyond his cynicism. I first dropped the seed of a confrontation between the participant and another group member who was trying to get closer to him. I personally empathized that the reason for his cynicism was probably not that he did not care, but that he cared too much. I encouraged others to talk with him about his isolated position in the group. None of these interventions helped him. He finally was able to make considerable progress when I engineered a role play in which he confronted himself as if he were another group member trying to get through his cynicism to say something that was personally important.

Issue: Does directive action on the trainer's part interfere with the democratic learning processes of his training group? The democratic processes of a training group confront participants with how much of their potential for change is self-determined. Moreover, the processes produce data about each person's unique style of learning, exerting leadership, and reacting to the influence of others. In subscribing to the usefulness of these processes, most trainers used to feel it was necessary for the leader role to be filled with nondirective behavior. The democratic group processes were initiated by confronting participants with an unstructured and ambiguous situation and then the trainer implicitly challenged them to make something out of it. In coping with this trainer-structured dilemma, participants produced data representative of their coping styles. The group could analyze and relate to these data once they found out what they were supposed to do. Marrow (1964) presents an excellent example of this type of training. The trainer's role, in the simplest sense, was not to tell the group what to do but periodically to ask members to analyze the group's process or to share their own reflections about the salient dynamics and learning conflicts facing the group or individual members. Colleagues who trained this way tell me, however, that they were not responding to a table of random numbers when they chose a particular time to ask the group to reflect. There is no doubt that their directiveness was subtle.

It is rare to find such a group today. For one thing, participants seldom come to groups without first speaking with a number of others who have had training-group experiences. They not only know what kind of group processes to expect but sometimes know about some of their trainer's salient personal characteristics. Trainers are no longer content with group learning rates produced without a substantial amount of trainer participation. They want to experiment with their intuitions and their theories for accelerating participant learning. Trainers also acknowledge that their own participation is an important buffer against their own frustration and the boredom that is produced by a nondirective style. Thus, in acknowledging the directive aspects of the trainer role, the issue has become, "How can the trainer give his directive participation to the group so that he does not interfere with the democratic learning process necessary for certain kinds of participant learning?"

The key to this issue is that the trainer must provide sufficient information for participants to evaluate his direction against their own objectives for participation. This entails

TABLE 1. Phase Progression in Weekend Human Relations Group

Time	*Specified Phases of Progression*	*Dynamics Which Evolved in the Group*	*Group Task Implicit in the Dynamics Evolved*	*Specific Within-Phase Trainer Behavior Emphasized*
Friday evening	1. Developing a climate of trust	Group story telling: members attempting to make comments consistent with what had preceded.	To determine whether there is enough member similarity to begin risking disclosure of individual differences.	Sharpen and clarify participant statements in order to facilitate interparticipant dialog. Call group members' attention to the trust elements of what is being discussed.
Friday evening & Saturday morning	2. Exposure of individual differences	Members present encapsulated self-statements revealing differences.	To test, simultaneously, reactions of others to differences and willingness of others to respect (self) defenses.	Establish norms of openness and respect for differences; support those members who wish to remain "closed" but assist them to articulate their reasons for taking this position.
Saturday morning	3. Exchanging perceptions of others	Members interact spontaneously with one another and build potentially growthful relationships.	To discover whether others could really be resources for personal learning.	Support feedback through encouraging participant interaction and involvement with others. Personally model here-and-now, self-disclosing participation, gradually curtailing activity with time.

Saturday afternoon	4. Individual problem-solving	Use of relationships in the group and here-and-now processes as vehicles for helping others look at their own contribution to "back-home" problems.	To capitalize on the full potential of the group resources developed.	Point out similarities between within-group relationships and out-of-group problems being discussed. Identify here-and-now group processes and their possible connections to the relationships under discussion.
Saturday evening	*5. Group problem-solving	Participants relate spontaneously shared problem without being controlled by the attitudinal differences of others or seeking to influence others to be more like themselves.	To work on issues having relevance for all group members without compromising the quality of the individual resolutions resulting from individual differences.	Remain quiet and unneeded.
Sunday morning	6. Reconnaissance and evaluation of personal learning	Free-wheeling participation with individuals experiencing periods of reflection, conceptualization, feedback, and the gambit of self and other confrontations and emotionalities.	To conceptualize the weekend's learning on an individual basis and to test these self-formulations with others.	Help members gain clarification, feedback, and back-home conceptualizations by identifying appropriate sources (persons) of information including oneself. Summarize group processes and challenges for further individual growth.

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* This phase was spontaneously designed by the group members.

SOURCE: S. A. Culbert, "Accelerating Laboratory Learning through a Phase Progression Model for Trainer Intervention," *Journal of Applied Behavioral Science* 6, no. 1 (1970): p. 45.

the trainer's being explicit about his objectives, clearly explaining why he thinks the process he is suggesting will accomplish the goals he has suggested. It also involves the trainer's explaining whether he is acting on a hunch or whether he has no idea at all about what the group might do. Such information leads participants to a different type of dependency than that created when they are asked to do something by the trainer without much more explanation than is implicit in it as coming from someone who is usually right. It is my desire, when being directive, to focus my directiveness at producing data for better democratic decision-making by participants. My directive behavior is usually focused on developing group processes and seldom at influencing specific decisions such as whether the group should accept an observer or discuss Bill's feelings before hearing from Pete. While I am usually willing to share the consequences I believe will follow from specific actions contemplated by the group, I try not to control the extent to which participants experiment with behavior for which I predict less than optimal consequences.

A very difficult situation for me is seeing a participant make a decision on the basis of adequate data but with an inaccurate interpretation of it. This is often seen in the person who explains to a group that openness only results in hurt for him. When asked if he is sure this is so, he produces a string of examples to prove the validity of his assertion. Continuing to contest his position would appear to be arguing with him over conflicting values. Remaining silent is to go along and give the impression of supporting the conclusion drawn by the participant. In such situations I tend to be a risk-taker, feeling that I do have a responsibility to provide each participant with a *choice* and feeling that at present this person does not have one. Usually I make him aware of my disagreement with the conclusion he has drawn from his data. I try to engage him in further data analysis, using data collected more currently from in-group events. For instance, with someone who is defending the desirability of not opening up, I call his attention to both the consequences others are experiencing for their openness and to the consequences he is experiencing for his lack of it.

Issue: Are there guidelines for knowing when to comment at the individual, interpersonal, group, or organizational levels?

Issue: When should the trainer react to content discussion and when should his comments be addressed to the process or dynamics of the discussion?

Issue: How does the trainer decide to intervene in the first person to initiate a personal interaction, in the second person to respond to someone, or in the third person to help others get into dialogue?

Each of these issues confronts the trainer with the potential usefulness of a theoretical or practical frame of reference which could present him explicit guidelines for making his interventions. Not many trainers give much thought to a theory or set of practical objectives when they make their interventions. Usually trainers base interventions on their intuitive feeling for the requirements of the immediate situation or in terms of an overall project such as that of getting group members to be learning resources for one another.

I have recently described (1970) how, before a training group's beginning, I attempt to build a cohesive frame of reference for my participation. First I interact with participants to reach joint agreement about the overall objectives of the group. I next try to predict the phases of development through which the group will have to progress toward its overall objectives. These predictions are open to modifications as the group actually unfolds, but the specified phases provide me with a frame of reference for understanding group events and provide insurance for participants that they will cover the necessary ground for achieving their objectives.

To illustrate, table 1 summarizes a weekend group whose overall objective was "to increase self-awareness through looking at the ways participants dealt with individual differences (Culbert 1970, p. 45)." The first, second, and last columns of this table are self-explanatory. The third column describes the salient dynamics evolving in the group as the members worked at each phase of the group's development. The fourth column describes my understanding of the task which was implicit in the group's dynamics at each phase. Not included in this table is a description of the systematic steps I took to facilitate the group's progression from one phase to the next.

Issue: Do better trainers really make fewer mistakes? The trainer's role permits a great deal of latitude. All trainers can and do make many mistakes without seriously impairing the learning processes of training groups. We err in reading group emotionality, in being sensitive to the feelings behind a participant's statement, in indulging our needs, and in projecting our conflicts onto participants. While I probably make substantially fewer and probably less serious errors now that I have been training awhile, there is little doubt that I am always making a sufficient number to demonstrate my contention that participants learn in spite of trainer mistakes. Certainly it is also true that some trainers make many more errors than others. However, the number and quality of errors are not the main differences between effective and ineffective trainers. Effectiveness is determined by the trainers' ability to hear and to learn from the comments, or feedback, evoked when he makes an error.

Some constellation of cues always is present when a participant feels misunderstood. Less effective trainers are those who miss these cues, respond to them defensively, or do not know how to react to them. More effective trainers are those who see these cues and respond to them with openness, although they may not even in retrospect, know how to react "appropriately." Trainer openness to feedback not only has immediate consequences for participant learning but also helps to establish a group climate where others can make mistakes without undue criticism.

A distinction can also be made between *merely* effective and *very* effective trainers. Participants who have merely effective trainers experience quality learning and considerable growth in their training groups. They receive feedback, have important insights, and experience emotionality bearing on struggles which are central to their current life goals. They even experience breakthroughs having major impacts on their life styles. When the group is over, these participants frequently return to their daily routines with real feelings of personal renewal.

Participants with very effective trainers also experience considerable growth in their training groups. When they learn something or experience growth, however, they also learn about the process of how they just learned. The rewards are considerable. Not only do they improve their situations with regard to current struggles, but they also learn how to cope better with the problems they will encounter after the group. They learn a technology for generating the personal and interpersonal data required in analyzing the periodic growth crises that characterize all of life. When faced with key life struggles, they not only will know about the resources available in a training group, but they will also have some ideas for creating similar resources among their current acquaintances.

HUMAN DEMANDS OF TRAINER PARTICIPATION

Training-group participants usually define themselves as normals developing their human potential and seldom as neurotics working to shore up deficiencies. Implicit in this self-definition is the expectation that they will be treated authentically and not clinically. Even though the distinction between normal and neurotic is frequently blurred, the role of trainer does entail using one's authentic self as an instrument of learning for others. This means taking risks and exposing parts of one's self that are not yet fully developed and with which the trainer is struggling. Such involvement, coupled with the intense, emotional encounters which take place in training groups, put numerous human demands on the trainer.

Issue: During a deeply moving encounter, can a trainer give rein to his own feelings when he has responsibility for others? When a participant overextends the limits of his emotional expression, trainers have a responsibility for protecting the participant and for making sure that structures are raised or missing perspectives brought out. This is a particularly challenging responsibility since at times of heightened emotionality it is likely that the trainer will also be experiencing poignant feelings and thus be less able to keep an eye out for others. Certainly this is the case when the trainer is personally involved in an interaction or is relating to an emotional experience of his own.

Three ways come to mind for handling this dilemma. The first is for the trainer to maintain some minimum amount of surveillance of others while becoming personally involved. This means hedging his involvements somewhat by staying in touch with his diagnostic understanding of the participants in his group. The trainer thus becomes involved to the extent that he can be responsive to cues signaling him to switch tracks, relying on his understanding to provide him quickly with perspective on whatever problems come up. For some trainers this means an availability for almost complete absorption in the moment, and for others it means somewhat less personal involvement. Who was it who said his highest human goal was to remain lucid in his ecstasy?

The second way of handling this issue is for the trainer to withhold his full involvement until he knows participants well enough to feel that the group has sufficient resources to cope with small crises. Participants must be responsive enough to provide one another with support as needed. Knowing that at least minor crises will get adequate coverage reduces the trainer's need for vigilance. If something major comes up, there will be resources available until the trainer can cap his feelings and regain his perspective.

A third way of dealing with this issue is to play the odds that no crisis will be so severe that it cannot be retrieved and adequately put in order at some later time. I find this assumption made most often by trainers who are not clinicians, and I do not believe it to be valid. I tell interns that the only trainers who have not faced a crisis of a magnitude that demands their immediate and total availability are trainers who either are not facilitating important learning or who have not trained very much. Moreover, being alert has implications for participant growth. James Clark,[*] contends that an even bigger challenge in being alert to emotional peaks is for the trainer to be able to distinguish when the peak contains possibilities for accelerated growth and then to use his training and experience to give direction to the participant rather than try to ground emotionally. I find this a very difficult, but important, thing to do.

Issue: Is it essential for a trainer to be "honest" and "open" at all times? Authenticity, honesty, genuineness, openness, and congruence are words which are frequently used synonymously but which actually communicate a range of concepts. Of these words, congruence is the concept which has primary utility for me.

Congruence means that a person's thoughts or feelings and the words he uses or the actions he takes are consistent. Rogers (1959) in the context of two-person helping relationships adds to this definition the idea that the consistency of thought and action must be perceived by those with whom an individual is relating.

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[*] In a personal communication.

Inasmuch as the perceptions of others are determined, in part, by their own needs and motivations, a person's actions will be congruent with his own thoughts and feelings more often than they are experienced as congruent by others.

As a person, in my everyday activities, I am always on the alert for situations in which I can appropriately be congruent and for people with whom I can risk congruence. As a trainer, I am committed to being congruent to the extent that I am able. I make explicit use of my congruence and of my incongruence--as perceived both by myself and by others--in addressing the learning goals of others. Table 2 summarizes some examples and consequences of trainer congruence. Although somewhat oversimplified, it illustrates how each of the four cells indicated can be split in half (dashes) to show the consequences of trainer participation which facilitate and which block participant learning.

In trying to be congruent, I always intend to be honest, to represent accurately the things I choose to say. I do *not* however, always intend to be open, to express that which I know and which is relevant to a group member or group situation. I think of myself as manipulative at those times when I am honest and selectively open without also being congruent. In furthering participant learning, I may think it quite congruent not to take action or not to reveal my thoughts and feelings. There are a number of reasons why I might remain silent: I might be having difficulty translating my clinical insights into words which would accurately communicate; my expression might rob someone else of the chance to share similar feelings; my expression might be too early in terms of an individual's emerging capacity to use it; or my nonparticipation would serve as a challenge providing others an opportunity to move beyond their passivity and to experiment with their own styles of leadership.

Issue: Should the trainer make his own problems part of the group process? There are actually two questions in this issue. How much of his struggles should the trainer share when he has alternatives for expression? How should the trainer deal with his own struggles when, as inevitably happens, they are interjected into the group's process as salient characteristics of his relationships with others?

I have found that there is a point in each group's life when group members are especially thirsty for the personal and "human" participation of their trainer. Prior to this time they may be solicitous of him, but probably for reasons other than humanness. Disguised in the members' apparent concern for the trainer may be issues such as his role in individual authority struggles and opportunities for flight. As long as group members focus on the trainer, they can avoid their problems in relating to one another.

At the critical time when most group members become genuinely interested in the trainer as a person, they also are probably using their interest to symbolize their growing independence.

TABLE 2. Trainer Congruence: Examples and Consequences for Facilitating and Blocking Participant Learning

		Participants View Trainer's Behavior As Congruent	*Participants View Trainer's Behavior As Incongruent*
Trainer Views His Behavior As Incongruent	Facilitating learning	Trainer feels good about himself and his relations with others. He feels creative and useful. Participants trust the trainer and his motives. They are more apt to listen carefully and to lower their defenses.	Trainer's commitment to himself provides momentum for him to support others in their confrontations of him. He utilizes discrepancies in viewing his congruence as a means for understanding the resistances of others. Participants see the importance of self-commitment in the face of group consensus. They learn more about "inquiry" as an alternative to personal defensiveness.
	Blocking learning	Trainer gets carried away with his own importance. He fails to provide others an opportunity to express their feelings and insights. Participants defer too much. They behave as if their own self thoughts are less important than the ideas of the trainer.	Trainer defensiveness is aroused by the frustration and vulnerability generated in being "misunderstood." Participants become unaccepting of minority dissent. They use this condition as a means of justifying their defensiveness to trainer inputs.

Trainer Views His Behavior As Congruent	Facilitating learning	Trainer finds support for his own lack of personal clarity. He may even disclose his dilemma to the group and explicitly solicit consultation. Participants view the trainer's personal commitment to training-group values of openness, honesty, and personal growth.	Trainer is confronted by participants over the problems created for them by his lack of congruence. He reacts sympathetically to confrontation rather than refusing to change. Participants find that their abilities to confront can yield positive results. They also find that the trainer has an "in-process" self-image rather than one of perfection.
	Blocking learning	Trainer is overindulgent to his own needs for too long a time. The absence of group opposition deprives him of one kind of vehicle for getting back in touch with himself. Participants work on trainer-focused projects while thinking that the trainer is responding to their needs.	Trainer fights and tries to defend an untenable personal position. Participants feel alienated from the trainer. They may even conclude that they have been punished for their confronting this discrepancy in trainer behavior.

Most likely they will begin to support the trainer as he reduces the number and character of his differences in participation and begins to resemble a regular group member. At this point, others usually pitch in to fill the maintenance functions the trainer had been performing.

Looking at the situation from the trainer's viewpoint, it may be that he has a need for participation which does not coincide with the group's natural timing for including him as a participant. To the extent that the trainer is able to find alternative outlets for these struggles (perhaps in other colleagues), he ought to refrain from interrupting or personally determining the group process. At such points, the trainer can rely more on technique and less on the use of his own person as an instrument for the learning of others.

The preceding comments speak normatively about "the time" for a trainer's inclusion as a group participant with personal struggles. Certainly there are many situations, almost from the group's beginning, in which the particular sub-project being addressed by the group may provide an appropriate context for problem disclosure by the trainer. The trainer may even believe that, rather than offset the curtailment of any learning objectives, his immediate participation will free him for further contributions. Of course, all this is quite academic when the trainer does not have a choice about whether he will disclose his struggle or when he lacks a frame of reference for differentially evaluating the utility of his interventions. I have spent many moments in groups without having either a choice or a frame of reference.

A particular trainer problem or struggle may be crucially relevant in releasing a group for a period of heightened learning. This is likely when the trainer is himself the center of a group conflict, or when, through exposing his own struggles, he can act as a catalyst for others with similar struggles. At such times, the trainer has a unique contribution to make if he is willing to share his thoughts openly. He makes a far greater contribution if he can discuss his personal struggles in relation to specific group participants than if he discusses them in longitudinal terms. At first glance, this strategy appears to expose less personal vulnerability than talking about problems in the context of one's back-home situation. An equal amount of personal risk is experienced, however, if the trainer focuses his disclosure on how his own struggles contribute to problems others are experiencing in the group. Moreover, if the trainer is not clear about his contributions, or does not stay with the discussion long enough for his role to become clear, he may stigmatize participants with an attribute which will confuse their relationship with others in the group.

Not only does the trainer's sharing of personal struggles serve as a model for participant learning and growth, but it begins to clarify the issues other participants bring to their struggles with the trainer. When the trainer acknowledges his actions, and thereby subtracts his input, what is left can be more clearly analysed and acknowledged by others.

Trainers want participants to leave their groups thinking highly of them. But far more important is that participants leave with a many-sided picture of the trainer. This is a key contribution which trainers can make to participant growth. Many trainers are personally attractive, sexually desirable, and very empathic; some are conceptual giants or powerful confronters. But very few, in my experience, manifest these qualities in their everyday activities to the extent that participants will see these qualities in their training groups. A statement I heard Chris Argyris make to a company president comes to my mind with respect to this issue. He said, "You know, Pete, the longer people work for you the more they come to like. . .[the company] and the less highly they seem to regard themselves." I believe an idealized image of the trainer has a similar impact on participants. Their real-self picture suffers in comparison with the trainer's competence and attractiveness. And the real-self/ideal-self gap for most people is wide enough without the trainer's widening it further with a one-sided self-presentation. I believe self-acceptance to be every bit as important a learning project for training-group participants as self-improvement.

Issue: What personal characteristics are most essential in predicting excellence as a trainer? Recently I supervised the selection of interns and others who were being trained by the NTL Institute as group trainers. In this capacity I received letters of recommendation written by almost every professional who had an active interest in the field of training. They recommended what seemed to me to be a very diverse group of people with very diverse personal characteristics. Few writers mentioned the same characteristics; for that matter, it was rare to find two recommendations for the same applicant emphasizing the value of the same personal characteristics.

Notwithstanding this diversity, I have my own pet theories about which characteristics best predict excellence. The two characteristics on which I consistently seem to rely are social competence and an aptitude for accurate viewing of one's own contributions to interpersonal dilemmas.

I realize that *social competence* must sound like a strange attribute to list as most important; for that matter, I am not even sure that I can be very articulate in stating exactly what I have in mind in using this term. During my training as a clinical psychologist, I noted that many excellent clinicians were failures in relating to people at the social level. They had difficulty discussing topics on which they were not particularly authoritative or in which they were not particularly interested. An example comes to mind of a therapist whom I observed during my internship. He was a masterful therapist and I learned a great deal from watching him. Also, his patients seemed to make excellent progress. This same man, however, would literally walk sideways down the narrow corridors of our clinic so that he would be saved the embarrassment which apparently came from not knowing the cordial exchanges that follow, "How are you today?"

The therapist in this example may not have had more severe personal conflicts than many who are excellent group trainers. My point is that, for whatever reasons, his problems were of a nature that impeded the *range* with which he could engage other people. Experience has led me to conclude that the range in authentic engagement of others outside of the structured training group seems to predict the range of availability and competence within it.

Extended discussion concerning *accurate viewing of contributions to interpersonal dilemmas* does not seem necessary since numerous references to this attribute are embedded throughout this paper. This is not a characteristic that most trainers develop naturally, although most have a natural aptitude for it. In many instances, a person's primary motivation for becoming a trainer is that he sees training as a means of developing this aptitude. Most who have acquired accuracy of self-perception seem committed to it as a central life value. It is essential to note, however, that no one who has acquired it is accurate in viewing himself in relation to others more than part of the time. Thus, for purposes of predicting trainer excellence, this characteristic also includes accuracy in picking up cues which indicate that one is inaccurate in viewing his contributions to interpersonal dilemmas.

Meta-values Two meta-values permeate most of what I do as a trainer. The first is interpersonal bias and the second is a strong commitment to assist participants in learning how to make out-of-group applications of their learning.

By interpersonal bias I mean that no group event or trainer intervention can be considered by itself for full understanding. There are several reasons for this assertion, perhaps the most obvious being the added learning available when group events are viewed from multiple perspectives. The previously mentioned example of group members' response to a silent member illustrated this point.

Examining motives functionally in terms of the interpersonal projects they are intended to service enables people to view themselves descriptively rather than moralistically. Evaluation becomes, to a greater extent than is typical, a matter of seeing whether a participant's behavior brings him closer to his interpersonal projects. This has considerably greater utility for personal growth than reflecting behavior against the "shoulds" of one's ideal-self or those which a participant introjects from the expectations of others. In everyday activities, these "shoulds" sacrifice self-acceptance for self-improvement. Discovering that no fundamental behavior change is necessary is a valuable and often overlooked contribution that training groups make to participants.

Perhaps the most important characteristic of emphasizing the interpersonal lies in the applicability of this learning strategy to participant worlds outside the group. Interpersonal correlates exist in the group for each step of the experimental and introspective methodologies (for example, Schutz, 1967) emphasizing insights and substantive learning.

These correlates are diagrammed in figure 1. Care has been taken to insure that each element in the column on the right (interpersonal) gets coverage equal to that of the elements on the left.

At a minimum, I believe the interpersonal encounters of the training group have value merely because they demonstrate that participants can push the boundaries of experience and interpersonal relationships beyond the limits within which they typically live. The potential is much greater. The enlarging of boundaries presents disequilibriums to typical living patterns and this, with the proper support, can stimulate change toward expansive new boundaries in

ACCELERATING PARTICIPANT LEARNING

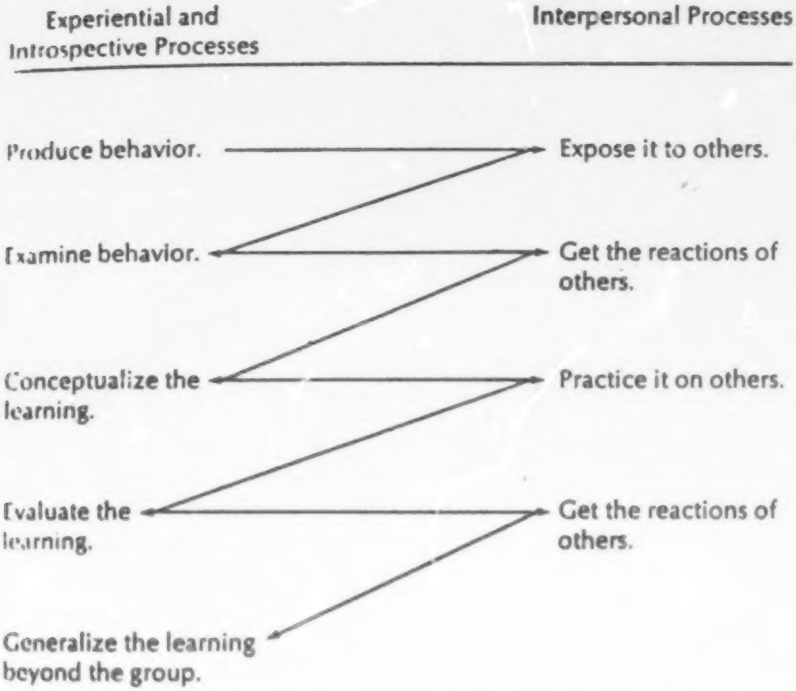
Experiential and Introspective Processes
Interpersonal Processes
Produce behavior.
Expose it to others.
Examine behavior.
Get the reactions of others.
Conceptualize the learning.
Practice it on others.
Evaluate the learning.
Get the reactions of others.
Generalize the learning beyond the group.

Fig. 1 Experience-based Learning Processes.

nonlaboratory activities. Too often, however, training-group learning does not transfer easily to nonlaboratory situations (Campbell and Dunnette 1968). In fact, trainers themselves have difficulty in doing this, as witnessed by the number of times trainers commiserate at the end of a lab that all they have to look forward to are the wife and kids.

Training groups can be structured to provide handles for helping participants bridge their learning to nonlaboratory worlds. I believe this structuring is most important, and I expend a considerable amount of energy on it. Accordingly, there are several types of interventions which I make to help participants cross the bridge from laboratory to nonlaboratory situations.

At the conclusion of learning episodes, I call attention to the contributions made by each person's style of participation. For example, I ask the group members to think about what just took place and ask them to summarize the conditions they saw contributing to these events. I also am likely to turn to those involved and inquire whether their responses were the ones they typically make in similar situations or whether there was something unique about their present reactions. Not only does my questioning encourage people to develop their understanding of what they individually bring to interpersonal transactions, but it also produces an awareness of the factors contributing to the learning processes which they have just observed.

In summarizing, I encourage participants to collect the impressions and reactions of the others present and to answer questions they might have about what has just taken place. Since I too participate, we all have a chance to expose the attributions we have made about what we just observed. Moreover, by this process we add dimensions to our developing relationships. Argyris (1968) believes that making attributions is an undesirable type of trainer intervention. In some ways I agree, and I tried to express this in my comments about defeating the propensity of people for letting "shoulds" influence their behavior. But I naturally make many attributions and participants usually make even a greater number. Therefore, I try to emphasize the importance of collecting information regarding attributions and of learning from the parts of one's self which are exposed in the process. New data about self are revealed when a person attributes one set of motives to data that equally well could support another. In the process, the entire group has the highly important and generalizable experience of collecting data which might have clarified some touchy issue if only they had asked themselves whether there was a chance they could have misunderstood the other person.

Another bridging intervention that I use is that of encouraging group members to bring critical back-home struggles to the group's attention. I do this after some valid basis for trust has been established and the problem-solving potential of relationships has been demonstrated by addressing the here-and-now problems in the group. My expectation is not that the group will be able to solve all, or any, critical back-home problems. Not only is it probable that these problems have persisted for some time, but also most are of an interpersonal nature and could only be solved by having the relevant parties present. I believe, however, that the ultimate validity of the training-group experience comes in focusing group resources on problems that really count. I encourage participants to discuss similarities between the problem-revealer's role in his problem and characteristics of his relationships with others in the group. This almost always leads to personal insights which are directly applicable to a participant's life outside the group.

If the group process is not developed to the point mentioned above, I do not encourage--and often block--revealing critical back-home problems. While I usually will tell a participant that I do not think the group has yet made the most of its capacity for dealing with his problems, I often have another fear in mind. During the relationship-building phase that precedes collaborative problem-solving, everything a person says can be used against him. It is not that anyone is particularly malicious, but issues of power, love, and ambivalence often entail interpersonal acrobatics. Participants are usually quite vulnerable when addressing back-home conflicts, and I neither want to see anyone deeply hurt nor do I want other members to become afraid of discussing their own critical problems and thereby to forfeit a valuable opportunity for learning.

I will, however, often encourage disclosure by a participant who has given out cues that indicate he is deeply troubled about some out-of-the-group situation. I feel remiss in my responsibilities as a trainer if I do not give everyone a chance to participate. What constitutes a "chance" for a given person is always an individual decision. Usually I will call a participant's attention to the unique qualities of the training group which might justify his disclosure; I will also mention anything I know which might indicate that disclosure is a poor strategy--the presence of someone who might misuse this information in another context, for example. But most important, I ask the participant to state the conditions under which disclosure would be a good strategy and I encourage him to collect data bearing on these conditions. This gives others a chance to contribute their personal support.

CONCLUSION

This chapter is a personal consolidation; it gives me a new bench mark for my own growth and discovery, something like composing a journal at the end of analysis. Learning to become an effective trainer and learning to conceptualize seem very much tied to what I have learned by facing my own personal struggles. Then too, I have noted that trainers who try to circumvent their struggles when leading training groups often tend to be bland or inappropriate. The challenge which I continually confront is to find ways of facing my struggles without blocking or confusing others. When I succeed, I am often able to find ways to make my struggles useful to others.

I have wanted in this chapter to stimulate you to think about what you do and why. I realize that many of the positions I have taken are controversial and that many readers will have differences with me. My wish is that we both will learn from our differences. I hope my positions will stimulate you to new clarity and that I will hear of your views and have a chance to extract the learning that our differences can generate.

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TRAINER ETHICS

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TRAINER ETHICS

I. INTRODUCTION

A. Definition of Ethics: *Rules of human conduct recognized in respect to a particular class of human actions or to a particular group, culture, or discipline;* (in this case, the behavior of trainers in the discipline of training.) Random House Dictionary of the English Language, College Edition

B. Why Consider Ethics

1. A code of trainer ethics is essential to develop awareness of the responsibilities and limitations of the trainer. Such a code is also necessary in developing a professional attitude and approach to training.

2. Adherence to a code of ethics that reflects trainer responsibilities and appropriate trainer behavior helps insure quality training.

3. Adherence to this code also helps to insure a useful, positive experience for the participant--in terms of both skill acquisition and personal comfort--rather than a destructive experience.

C. Areas of Responsibility

1. Responsibility to himself.

   For example: the trainer should feel self-satisfaction and pride in his training effort and delivery.

2. Responsibility to the participants.

   This includes responsibility not only to the individual learners, but also to the programs in which the participants work. (See II. Ethical Issues outline for discussion.)

3. Responsibility to his profession, his colleagues, co-workers, and the training field.

4. Responsibility to the program.

When one is training, he represents not only himself, but also the agency or program in which he works. He has a responsibility to deliver training in a manner that is a credit to that affiliation.

II. ETHICAL ISSUES

The following are specific guidelines that a trainer must use to establish a code of ethics in order to carry out the four areas of responsibility outlined above.

A. Selection of Participants

The trainer clearly articulates to prospective participants the criteria for recommended selection of individuals for a particular training experience. The trainer is aware of potential problem areas, and, to the limited extent that personal difficulties are predictable and screening procedures can reasonably be implemented, prospective participants should be selected on the basis of these principles.

1. Persons whose goal in participating would be to seek aid in or a cure for emotional disturbances are considered inappropriate to this course.

2. Experience has shown that participants who are personally motivated and have volunteered for training have the greatest potential for success. Those who are responding to demands or wishes of another, e.g., an employer, may be inappropriate where training demands a high level of commitment from the participants.

3. Trainers may want to indicate in stating selection criteria that priority of selection should go to those individuals who have, in their own work setting, a position of responsibility to make use of the skills in which they will be trained. Second priority would be given to persons seeking a training experience solely for personal growth.

B. Goal Clarification

1. The fantasies and pretraining expectations that participants bring to a group will represent as many different interpretations as there are group members. The trainer, then, is the agent

upon whom the clear statement of goals and intentions is predominantly dependent.

2. The trainer must be clear at the beginning and maintain clarity of definitions and appropriateness of interventions throughout the group experience.

    a. This is especially true where goal clarification relates to skill building vs. therapy.

    b. Consideration of contracting for or negotiating individual learning needs applies here.

    c. Includes consideration of appropriate application of skills and limitations learned in training. For example:

        > Completion of a counseling skills course does not necessarily qualify an individual to be a trainer of that course.

C. Accountability

The trainer makes a clear statement regarding his commitment to imparting specific information and skills, and/or conducting specific activities. He builds in evaluation mechanisms by which the learners, the employer, or the trainer may assess the meeting of that commitment.

D. Values and Philosophies

The trainer is aware of his personal values and philosophies, those of the participants, and those espoused by the group to which the trainer is accountable. The trainer recognizes that those values will not always be congruent, but that they should be compatible to the extent that training can be conducted without violating the validity of the point of view or the worth of any individual or program. Subjects that need to be considered are:

1. Political viewpoints

2. Sexual roles

3. Ethnic-racial and intercultural issues

4. Societal norms

5. Approaches to drug abuse

6. Therapeutic style

E. Competence

The trainer recognizes the boundaries of his competence and the limitations of his techniques and does not offer materials nor use techniques that fail to meet professional standards or with which he is unfamiliar.

F. Misrepresentation

A trainer does not claim, either directly or by implication, professional qualifications that exceed his actual qualifications, nor does he misrepresent his affiliation with any institution, organization, or individual, nor lead others to assume he has affiliations that he does not have. The trainer is responsible for correcting others who misrepresent his professional qualifications.

G. Acknowledgements

The trainer clearly indicates any known ownership, authorship or credit for the materials, concepts, and methods that he utilizes in presenting training. The trainer acknowledges any support or aid provided by persons assisting in preparing or presenting training. Where possible, acknowledgements are made in writing. Attributions of authorship for materials (and permission granted for their use) should be in writing.

H. Trainer Influence

The trainer is aware of the disproportionately large degree of influence he has upon the group and facilitates the group in understanding the need for continual assessment of this leadership factor. The trainer uses this influence in a way that facilitates learning, according to the agreed upon goals, and does not overstep these boundaries. The trainer actively seeks feeback from the group as well as from his colleagues in order to insure participants' involvement in group decisions.

I. Moral and Legal Standards

The trainer in the practice of his profession shows responsible regard for the social codes and moral expectations of the community in which he works. He recognizes that violations of accepted moral and legal standards on his part may involve the participants and/or his colleagues in damaging personal conflicts and impugn his own name and the reputation of his profession. He also recognizes that his congruence with the social and moral expectations of the community in which he works will facilitate more effective training.

1. Experience has shown that trainers becoming sexually involved with participants during training may be highly volatile; this is inappropriate trainer behavior.

2. Participating in illegal drug taking behavior and/or excessive legal drug taking behavior with trainees is also highly volatile and inappropriate.

J. Confidentiality

The trainer respects and protects the integrity and confidentiality of the group or individual with whom he is working.

K. Referral Services

The trainer recognizes that emergency medical and/or mental health referral services may be required, and seeks to obtain direct access to those services and to utilize them when appropriate. An effective referral by a trainer includes a clear rationale for the referral, consultation with at least one other trainer or supervisor when available, confidential communication, and follow-up.

Return-to-home procedures should also be clearly designated.

L. Personal Growth and Improvement

The trainer accepts his responsibility to maintain the highest standards of training and develops his skills as the state of the art develops. He continually seeks to improve on those skills already acquired and to expand the range and scope of skills and knowledge that he can apply professionally. Whenever possible, the trainer seeks supervision of training activities he conducts, and actively solicits feedback from participants, trainers, and supervisors.

MODULE X: USING TRAINING MATERIALS

PERSPECTIVE

The purpose of this module is to provide participants with an opportunity to practice modifying training materials to meet the needs of various trainee populations and to receive feedback on those modifications. This module is a guided practice session to prepare participants for activities they may have to perform on the job. This module includes:

- Overview
- Structured Experience: Adapting Training Materials
- Course Summary
- Posttest

BEHAVIORAL OBJECTIVE

Using the information presented in Module X, at the end of this module, the participants will be able to:

> Given a case situation, appropriately modify at least one module of a training course to meet the needs of a particular group of trainees.

MODULE X: USING TRAINING MATERIALS

OVERVIEW

ADAPTING TRAINING MATERIALS, A STRUCTURED EXPERIENCE

Goal

This structured experience is designed to provde practice in modifying "packaged" training materials to meet the needs of particular trainee populations.

Description

Teams will be given descriptions of various trainee populations. Using these, adapt a module to meet the needs of that population. After 45 minutes, move back into the large group to report on your choices.

Comments

WOMEN IN TREATMENT: ISSUES AND APPROACHES

The module you have been given is Module III: Characteristics of the Female Addict. Please read it carefully.

Your trainee population is composed of fifteen women and six men, all of whom have worked in the field of substance abuse at least two years. These people work in either alcohol treatment programs or in programs that counsel polydrug abusers. Their programs have a client load that is between 30 and 70 percent female.

MODULE III: CHARACTERISTICS OF THE FEMALE ADDICT

Together, Modules III and IV stimulate trainees to re-examine their beliefs about the female addict. The purpose of Module III is to ensure that all trainees have a common base of knowledge about the female addict. This module includes:

- Characteristics of the Female Addict as Depicted in the Literature
- The Female Addict Today
- Assessing Client Needs

LEARNING OBJECTIVES

At the end of the module, and without the aid of notes, the trainees will be able to:

- Identify at least four characteristics of the female addict as described in the lecture
- Identify at least two methodological problems in research on the female addict
- In a simulated assessment interview--

  Identify at least four kinds of information needed for a client assessment and

  Identify at least two needs and two problems of the client
- From the lecture material and the readings, select the most appropriate response on the posttest given a situation in which the concepts apply

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
9:00- 9:10	Introduction to Module III (III-A)		LG	T	● Introduce the module by relating the content of Module II (attitudes, myths, and stereotypes about women) to the female addict. "People view the female addict through the filter of their attitudes, myths, and stereotypes about women. Often this leads to assumptions about the female addict: what she is like, how she should act, and why she takes drugs. As treatment staff, we need to continually re-examine our beliefs about the female addict, since those beliefs influence our behavior towards her."
9:10 9:40	Lecture: Characteristics of the Female Addict (III-B-1)	Lecture outline on newsprint	LG	T	● Lecture on the characteristics of the female addict (see p. 93 for the complete lecture). Methodological Problems in the Research Limitations in Sampling Chein, *The Road to H* Interpretation of Data Curlee, alcoholic women Family Background May be closer to father than mother. Is a product of battering and emotional neglect. Was subjected to strict sex-role socialization. Shows a lack of affective and cognitive resources.

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
9:10- 9:40	Lecture: Characteristics of the Female Addict (continued) (III-B-1)			T	Has a diminished capacity to experience joy and pleasure without the use of drugs. Psychological Dynamics (MMPI scores) Shows a lack of self-confidence, narrowness of interests, tendency to worry. May be extrapunitive, relies on a power orientation. Drug Use Patterns Generally turned to drugs for "kicks." Tends to use medical narcotics (morphine, etc.) and sedatives more than men do. Seems to become addicted more quickly than men. Relationships with Men Exhibits multiple problems in close relationships. Frequently has a spouse or partner who is involved in illegal activities. Fears being physically harmed by spouse. Homosexuality Engages in homosexual relationships more frequently than do males. Health Rarely receives proper health care, even for serious conditions. Has more gynecological problems than non-addict. Pregnancy Believes that heroin is a contraceptive.

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
9:10-9:40	Characteristics of the Female Addict (continued) (III-B-1)			T	Does not actively plan birth control. Does not tolerate well the normal discomforts of pregnancy. Unrealistic Expectations about Pregnancy Believes everything will be fine now. Feels pregnancy will serve as impetus to "straighten out." Anticipates that baby will bring many fringe benefits. Education, Skills and Means of Support Has a disadvantaged educational background. Shows a history of difficulties in school. May engage in prostitution. May engage in shoplifting. May practice other criminal activities.
9:40-10:00	Discussion III-B-2	Newsprint Markers Masking tape		T and t	● Discuss the characteristics of the female addicts in the trainees' treatment programs.
				T	● Facilitate the discussion by asking trainees to describe how the female addicts they treat are similar to or different from those described in the readings and the lecture. List on the newsprint the characteristics of the female addict as described by the trainees.
				T and t	● Then discuss the probable effects of societal conditioning on female addicts.

MODULE: III TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
9:40-10:00	Discussion (continued) (III-B-2)			T	• Facilitate the discussion by asking trainees to think about the myths, stereotypes, and attitudes about women discussed in Module II. Ask trainees if they think the addicted woman has internalized some of these beliefs. If so, which ones? If the addicted woman feels that she does not meet the standards does this affect her self-concept and behavior?
				T	• List on newsprint the effects of societal conditioning on the female addict as identified by the trainees.
10:00-10:15	Break				Break
10:15-10:25	Assessment Interview Exercise (III-C-1)	Client History Treatment System Overview Client Needs Form	LG	T	• Define "Need" and "Problem" (see definitions in Instructions p. 105). • Explain the exercise. The exercise is a simulation of the first of a series of assessment interviews with a female client. The purpose of the interview is to identify the client's needs and problems. At the end of the interview, trainees will be asked to describe the client's needs. • Give instructions for the exercise (see full instructions on p. 105).

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
10:15-10:25	Assessment Interview Exercise (continued) (III-C-1)			T	This will be a role play in small groups. A volunteer will play the client. The other trainees in the small group will act as counselor-interviewers, each having four minutes to interview the client. Each interviewer should build upon information obtained by past interviewers. After all the trainees have interviewed the client, the group should have enough information to identify the client's needs and problems. ● Divide trainees into three small groups; assign a trainer and a small-group room to each.
				Ts	● Take small groups to their assigned rooms.
10:25-10:35	Preparation for the Interview (III-C-2a)	Newsprint		T	● Prepare the total group for their role in the exercise (5 min.) ● Ask the group members to read the Client History and Treatment System Overview (in Trainee's Workbook) while you are out of the room. After that each small group member should think about four questions she would want answered in an assessment interview. ● Explain to the small group that you are going to take the next five minutes to work with the client volunteer about her role. ● Take the client volunteer outside the large-group room to prepare her for the exercise. Give her the Client History to read.

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
10:25- 10:35	Preparation for the Interview (continued) (III-C-2a)			T	• Discuss how she will play the part of the client. • Ask her to fill out Client Needs Form and copy on newsprint her assessment of the client's needs.
				Vol. t	• Discuss, with the trainer, characteristics of the client. • Fill out the Client Needs Form identifying the client's needs, then list those needs on newsprint. • Review the Client Needs Forms; have extra available for trainees. • Select a group member to be timekeeper (or the trainer can be timekeeper). • Select a group member to be the first interviewer. Continue to the right around the circle to choose the next trainee to play the interviewer.
10:35- 11:10	Assessment Interview (III-C-3)		SG	T	• Ask client to rejoin the group.
				t	• Interview the client for four minutes each. • Take notes on the needs and problems of the client.

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
11:10-11:15	Identifying needs and problems (III-C-4)	Client Needs Form	SG	t	- After the role play is finished, write on Client Needs Form the needs and problems of the client as they were presented in the interview; then list on newsprint.
				T	- Take the client outside the room and help her get out of the role she played.
11:15-11:50	Discussion (III-C-5)	Client's assessment of needs (a) written on newsprint	SG	T and t	- In the small group, review the client's description of her needs. - Discuss the client assessments. - Ask trainees to compare their assessment with the client's assessment of her needs. How do they differ: How are they similar? Why? What happened in the interview? - Facilitate the discussion to explore the ways in which the female addict is stereotyped. Did participants stereotype the client? How does stereotyping of female clients take place in treatment programs? - Discuss the ways in which stereotyping occurs in treatment programs.
11:50-12:05	Review of Assessment Exercise (III-C-6)			T and t	- Return to the large group to summarize the mornings activities. - Review the module. Ask the trainees to describe what they learned from this module.

X-13

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
12:05- 1:15	Lunch				Lunch

601

602

PURPOSE: To give trainees an overview of the characteristics of the female addict as portrayed in the literature

TIME/ CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40

III-B-1

> The literature on women addicts is very sparse compared to the reams produced each year that deal with men;. . .researchers have overlooked the special problems of women addicts and have been content to generalize from the data about men (Waldorf).

METHODOLOGICAL PROBLEMS IN THE RESEARCH

There are problems existent in any research effort, especially when that effort involves as diverse a population as women in treatment. Many of the myths and stereotypes about the female addict emanate from these imperfections in research methodology. For example, Damman wrote that the

> ...conclusion that the female addict is sicker and more deviant than her male counterpart results from: (1) research in opiate and alcohol abuse that was deficient in methodology, data, and interpretation; and (2) attitudes found in our society that condone different types of behavior for men and women and hence endorse the idea that women who do certain things are more deviant than men who do the same things.

She notes that the literature creating a profile of the female addict as sick and deviant resulted, in part, from a very small number of women entering substance abuse treatment programs, from limited research attention paid to them, and from poor metholodogy employed when studying them.

Prior to the sixties, the tendency was to either exclude women from studies on addiction or lump them together with men. The findings (which pertained primarily to male addiction) were projected upon the female addict population. In the sixties, however, there was some acknowledgement that lumping male and female addicts together might distort the data and its interpretation. Nonetheless, the initial awakening of research interest in female addicts in treatment was not necessarily beneficial. As with most minority groups, female addicts received separate but unequal "treatment" from social science research.

Limitations in Sampling

An example of this trend can be found in *The Road to H,* an early comprehensive study of heroin abuse. Isidor Chein et al. (1964) were among the first researchers who recognized the methodological problems presented by using the small sample of women opiate addicts in the general study of addiction. In discussing this methodology they commented:

> If female(s) are not materially different in relevant aspects of their drug use from males. . .then, in excluding them from the study we have sacrificed little. . . . If. . .there are materially relevant differences, including [women] obfuscates the picture for all. Why not study all groups separately?

Shortly after, Chein conducted a study in which male and female addicts were discussed separately: one chapter was devoted to summarizing the findings on 20 female addicts, the rest to a carefully controlled examination of 202 men. The men were divided into four groups, which were controlled for a variety of factors, including history of delinquency, drug use, and institutionalization.

CONTENT ON THIS PAGE: **Methodological problems in the research, continued; Family Background**

TIME/ CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40 III-B-1 None of the controls used to study the men were applied to the women; therefore the conclusions about the female addict were researched without employing a uniform research design and without controlling for variables.

Although Chein for the most part avoided commentary about overt sex-linked differences between male and female addicts, other writers commenting on the study have suggested that Chein found the female addict to be sicker and more deviant than her male counterpart (Zahn and Ball, 1974). This process by which profiles containing *implicit* comparisons are interpreted as if those comparisons had been *explicit* occurs frequently in social science literature . This is the process by which myths are created. Chein's study merely reported on 20 female addicts; it did not purport to be exhaustive. Nonetheless, the chapter summarizing one exploratory study on the 20 females was entitled "The Female Addict," not "A Study of 20 Female Addicts." This chapter is cited in virtually all the literature appearing on female addicts. In the absence of contradictory data, the image of the female addict as sick and deviant became generalized by this process of citation; the picture was further supported by societal attitudes about females in general (Ehrenreich and English, 1973; Freud, 1963).

Data Interpretation

The interpretation of data is another methodological problem to be considered. One example involves a study by Joan Curlee of 100 men and 100 women of middle- to upper-middle-class backgrounds to investigate the contention that alcoholic women demonstrate a higher degree of serious pathology than alcoholic men (1974). Curlee concluded that the women had been judged to have a higher degree of serious pathology on the basis of the amount of previous psychiatric treatment they had received and were thus considered psychologically sicker than men. She disapproved of this basis. A history of psychiatric treatment episodes is suspect as an index of sickness because women receive more cultural support than do men for seeking psychiatric treatment and women do so more often. Treatment per se is therefore not necessarily indicative of sickness (cf. Chesler, 1972).

Note to Trainer:

For additional examples of limitations in sampling and problems in data interpretation, see Note following this lecture.

FAMILY BACKGROUND

Most studies have found that female addicts generally come from predominantly blue-collar backgrounds. One study found that although more women's fathers than men's were professionals, women also had a higher proportion of fathers with criminal records and sporadic employment histories.

Women addicts describe their parents differently than do men. They seem to relate better to their fathers, whereas males say they related better to their mothers. Women described their mothers as distant, authoritarian, and cold. Fathers were often described as indulgent and seductive; in fact, many women addicts (25 percent in one study by Densen-Gerber) have experienced sexual relationships with fathers or father surrogates.

TIME/ CODE	LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT
9:10- 9:40 III-B-1	Women addicts also report that they have experienced less compatability within their family of origin than have men. In Waldorf's study, 25 percent of the women (compared to 11 percent of the men) stated that they got along poorly with their families before beginning to use heroin. White women were found to have had worse relationships with their families than did black or Puerto Rican females. Chein found that 70 percent of his female sample ". . .were recurrently in trouble with their parents."
	Many women addicts grew up in a home with an addict or alcoholic relative. Waldorf found that 46 percent of the women in his sample (compared to 26 percent of the men) grew up in a home that had alcoholic or addict members.
	In his book *The Road to H*, Chein reported on the incidence of deprived home situations among female addicts. More than one fourth of his sample had lived in foster homes as children. Fathers were found to have been frequently absent during their early or later childhood and parents were either exceedingly strict or overindulgent. Fifty percent of the parents of these women had alcohol problems, compared to only 30 percent of the males' parents.
	One prevalent characteristic of women addicts is that they come from emotionally disadvantaged family backgrounds. Chambers et al. report that 54.8 percent of the addicted women they studied were raised in broken homes. Family dissolution occurs more frequently and at an earlier age among female addicts than among males.
	As children, these women were deprived of nurturance and warm, loving care. Their parents made unrealistic demands and had expectations inappropriate to the child's age or development. When they could not satisfy these demands they were criticized and punished.
	The addicted women studied by Mondanaro paint a very dismal picture when asked to describe their home environment, and how their parents (or guardians) demonstrated love. Toys and books were usually nonexistent. Parents were not involved in the children's school work and accomplishments; parents taught them few skills to cope with the demands of the home environment or to prepare them for adult living.
	In Mondanaro's study, she discovered that female addicts were often the products of strict sex-role socialization. Girls were raised to be girls: passive, dependent, feminine, coy, and nonassertive. According to Bem, this type of strict sex-role socialization ". . .correlates with high anxiety, low self-esteem, and low self-acceptance."
	Emotional neglect as an infant, parents' expectations of premature performance, and strict sex-role socialization fostered a sense of personal inadequacy in these women. As a result of this upbringing and the fear of failure, criticism, and punishment it engendered, many addicted women seem to have a diminished capacity to experience joy and playfulness, and are afraid of taking risks in relationships with other people.
	The female addict appears to be a product of battering. The sense of [illegible]ure and low self-esteem derived from an emotionally deprived home experience are reinforced [illegible] society at large. In a society that judges human worth by material power (class), by color [illegible]n (race), and by the presence of a penis (sex), poor people, nonwhites, and women are consi[illegible]d less worthy (Mondanaro).
	The family of origin and society both echo and re-echo words the child hears and ultimately believes—that she is no good. Some victims of this type of battering use drugs, some demonstrate other self-deprecating behaviors.

CONTENT ON THIS PAGE: Psychological Dynamics; Drug use patterns; relationships with men

TIME/ CODE	LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-
9:40

III-B-1

PSYCHOLOGICAL DYNAMICS

Using the Minnesota Multi-phasic Personality Inventory to analyze the psychodynamics of male and female addicts, Olson found that

> ...the males were significantly more defensive and guarded and the women were more frank and indiscreet with a noticeable tendency to be more critical of themselves. The higher D (Depression) score in the female group suggests that they were characterized by a lack of self-confidence, narrowness of interests, and had poor morale, a tendency to worry, uneasy self-concern, and dissatisfaction with their immediate situation. The significantly higher Pa (Paranoid) score suggests that the women were using the paranoid mechanisms of projection, extra-punitiveness, and reliance on a power orientation. . .the high Pt (Psychasthenia) also suggests that the women showed more doubts, perplexity, and apprehension, or unreasonable fears, than did the men.

Ellinwood et al. found that women addicts were more frequently diagnosed as neurotic and psychotic, whereas men were more often labeled as having personality disorders or being sociopathic.

Waldorf notes that ". . .when women become addicts they suffer more guilt and remorse because it is harder for them to go against society's prescription for femininity and its laws and mores." Because little deviation is allowed women within their sex-role socialization (for example, it is not permissible for a female to "sow wild oats"), they usually feel more constraints to abide by the established norms and legal code of the culture. Thus, when they do deviate, they may suffer about it more than do men.

DRUG USE PATTERNS

Chambers et al. found that the majority (57 percent) were initially turned on to illicit drugs through a friend, and did so for "kicks" or because of curiosity. Thirty-one percent started to use drugs through medical or quasi-medical channels; the drugs used were legally manufactured, a pattern more prevalent among white addicts than blacks. A third group, 11 percent of the sample, were introduced to drugs by an addicted family member.

Several studies have revealed that male and female addicts seem to differ, in some respects, in terms of patterns of drug use. Ellinwood et al. found that medical narcotics (e.g., morphine and Demerol), alcohol, and sedatives were more frequently used by females than by males. Women seemed to become addicted more quickly than men and took a longer time to attempt abstinence.

RELATIONSHIPS WITH MEN

Generally female addicts have been married, but the relationship is usually fraught with multiple problems. The family and societal environments that bred the woman's feelings of low self-esteem and lack of confidence are usually repeated in her relationships.

The addict's spouse or partner is often, but not always, involved in drugs. He is usually not gainfully employed. His "work" may be stealing, boosting, passing bad checks, dealing drugs, and pimp-

CONTENT ON THIS PAGE: Homosexuality; Health; Pregnancy

TIME/ CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40 III-B-1 ing. He may be violent, taking out his frustrations by beating his wife and child. The wife's fear of being physically harmed by her spouse, should she decide to leave, cannot be under-estimated. Many women maintain these relationships because there are moments of love and warmth within them and the alternative seems to be having no relationship at all.

HOMOSEXUALITY

Although many women seek and find love in homosexual relationships, these, too, may pose problems. Waldorf notes that "American society stigmatizes addicts, prostitutes, and homosexuals and often the female addict is at least two of them—sometimes three. . . ." Thus, in addition to feelings of guilt about prostitution, the female addict may suffer considerable emotional pain from violating society's norms concerning homosexuality. One study reports that many more female addicts than males are homosexual: 29 percent of the females compared to only 3 percent of the males admitted to being either homosexual or bisexual.

Twenty-three percent of the women also reported having engaged in homosexual prostitution while in the streets. Many female addicts seem to become lesbians as a result of suffering abuse by men while prostitutes.

HEALTH

Female addicts also frequently have problems in the area of health. One study found that many women addicts suffer from thyroid disorder, hypertension, asthma, and hepatitis—conditions that require, but rarely get, proper treatment. Another study notes that "most women caught in the criminal-addict treadmill have had one or more abortions," which may have caused gynecological damage. One gynecological study of female addicts found that 90 percent had had venereal disease, and 63 percent were infertile during the period of drug abuse.

PREGNANCY

The addicted woman normally does not plan to get pregnant. Since heroin interferes with normal ovulation and menstruation, the woman is accustomed to missing periods frequently. The notion that the addict is protected from conception while using heroin is widespread. A woman may go for years without using birth control and not get pregnant. Although pregnancy may create great hardships, many female addicts will elect to continue their pregnancy. Some writers have described this as a symptom of women's passivity and inability to act on the world. Many addicted women do not actively plan birth control, and when they find themselves pregnant, they again do not actively think through their various options (abortion, adoption, detox or methadone maintenance, heroin continuation, barbiturate continuation).

Addicts do not tolerate the normal discomforts of pregnancy well. When they experience difficulty sleeping, irritability, fatigue, nausea, and other pains associated with pregnancy, women maintained on methadone often feel that their doses are not high enough. There is also a high incidence of obstetrical complications such as toxemia of pregnancy (pathological disorders generally manifested as metabolic problems), breech presentations, placental abnormalities, and postpartum hemorrhage. Many babies are premature and/or addicted and many show evidence of retarded intrauterine growth. Some experts believe that these babies may become predisposed to drug addiction later in life.

TIME/ CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40

III-B-1

The incidence of pregnancy among addicts has been found to be increasing, especially among those under 21 years old, who account for 50 percent of all such pregnancies.

Many mothers frequently talk about "guilty feelings" during their pregnancy. Mondanaro states that many pregnant addicts may be saying that they will feel guilty when and if the child experiences withdrawal.

Unrealistic Expectations Resulting from Pregnancy

Many women believe that now, since they are pregnant, their own mothers will accept and love them; their husbands will get it together, get straight jobs, stop drinking, lose weight, rent a larger apartment, pay more attention to them, stay home more, be helpful around the house: in general, the quality of life will improve. They also believe that they will not use heroin or other drugs because that will hurt the baby and they don't want to do that. Many feel being pregnant will give them impetus to "straighten out."

When questioned about difficulties and disappointments they can foresee surrounding the birth of the baby, the women usually see no obstacles to their happiness, and truly believe that the child will bring many fringe benefits. Anyone who has been a parent can relate to the unrealistic aspects of these beliefs.

EDUCATION, SKILLS, AND MEANS OF SUPPORT

Female addicts have been found to have had disadvantaged educational and occupational backgrounds. Most studies indicate that approximately 66 percent of this group have not completed high school and have usually dropped out of the tenth or eleventh grade after a long history of learning difficulties, misbehavior, and chronic truancy.

Among female addicts in the New York Civil Commitment Program, 65 percent had arrest records. Prostitution and shoplifting were the most frequently used means of financial support during an addiction career, although one-third of the sample also reported having committed burglaries, armed robberies, and/or muggings.

SUMMARY

We have discussed characteristics of the female addict as described in the literature: her background, her relationships, her feelings about herself and her role. We have also mentioned a few of the problems inherent in the interpretation of research data. Your resource manual contains several reference papers you may want to read for further information.

Some of the characteristics that I have mentioned may pertain to clients in your own programs. Some of the female addicts you have treated may have other characteristics. What are some of the similarities and differences you have noted?

Note to Trainer:

Following are more examples of methodological problems that can be used if needed for discussion.

CONTENT ON THIS PAGE: For Discussion: Other examples of Methodological Problems

TIME/ CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40 III-B-1 *Facilitate discussion of characteristics of female addicts in trainees' treatment programs by asking trainees to describe how their clients are similar to or different from those described in the readings and the lecture. See also Note to Trainer for examples of characteristics as identified by trainees during the field test.*

OTHER EXAMPLES OF METHODOLOGICAL PROBLEMS

Other examples of limitations in the sampling procedure are evident in studies by Mellinger and Parry. In 1971, Mellinger et al. found that psychotherapeutic drug use was greater among women than men. Parry et al. (1973) studied use of prescribed tranquilizers/sedatives and found daily use to be most prevalent among lower income, more poorly educated housewives.

The format in both the Mellinger and Parry studies suggests that sampling procedures may have led to underrepresentation of street drug users. The data generated by these studies were collected by interviewing respondents who were "selected by rigorous sampling methods in order to form a cross-selection of American adults in households" (Parry et al., 1973). The restriction to "adults in households" suggests that institutionalized adults were not considered; also, that persons not living in a stable residence may have been excluded. A footnote suggests that, if represented at all, "street people" constituted a very small portion of the total sample since, "Those few women who were neither employed nor full-time housewives, e.g., nonworking, unmarried students, were omitted from our analysis."

Finally, by restricting their sample to adults, the authors biased their description of the patterns of drug use by not including persons under 18. Unlike the street drug user who may represent a small portion of the population, persons under 18 represent a singificant percentage of the population in most metropolitan areas. For example, they represent 30 percent of the San Francisco Standard Metropolitan Statistical Area (SMSA) population.

Data Interpretation

A study by George De Leon (1974) involved 148 men and 60 women to measure the extent of and change in psychopathology during the course of treatment. The author used seven self-report scales. On the basis of these scales he found differences related to both sex and ethnic background. Females in each ethnic group (black, white, and Puerto Rican) scored higher (indicating a greater degree of depression, anxiety, or other indicator of pathology) than their male counterparts. "These findings," the author notes, "point to the possibility that for women, especially white and Hispanic (Puerto Rican), addiction may relate to or express a more serious and complex psychological disturbance." However, what De Leon fails to note is that self-report scales are particularly vulnerable to cultural norms: high scores may reflect a self-perception of deviance from those norms, rather than sickness, per se. It may be that women report themselves as deviant because they believe they are. However, since deviance from norms is not necessarily sickness, to interpret the elevation of self-report scales as sickness, without considering cultural and ethnic norms, is to overlook the probable impact of labeling. An interpretation (of self-report scores) such as the one offered by De Leon can become part of an invidious tautology: female addicts score higher on scales purporting to measure psychopathology; therefore, they are judged to be sicker, are told they are sicker, are treated as if they are sicker and, therefore, score higher on scales measuring sickness (psychopathology) (cf. Chesler, 1972 ; Broverman, 1970; Gordon and Hall, 1974).

TIME/ CODE

NOTE TO TRAINER: DISCUSSION ABOUT CHARACTERISTICS OF THE FEMALE ADDICT

9:25-
9:45

III-B-2

This list represents the viewpoints of one group of trainees. The trainees in your session may generate different items. This brief exercise gives the total group information about how individuals view the female addict. The data gives the trainees a "feel" for the group and a starting point to help individuals analyze their approach to women's treatment.

The following are some of the characteristics of the female addict as identified by trainees during the field test.

- low self-esteem
- bad self-image
- no direction
- lack of confidence
- heavy family conflicts
- guilt
- lack of skills
- broken home
- confusion between love and sex
- difficulty dealing with feelings of dependency--dependency or counter-dependency
- poor adult models
- no sense of belonging to
- not feeling good about other women, hence not feeling good about themselves
- no elementary life skills (eg., communication, problem-solving)
- "I'm competent, but my 'sister's' not competent"

TIME/
CODE

NOTE TO TRAINER: ASSESSMENT INTERVIEW EXERCISE

10:15-
11:45

III-C

The purpose of this exercise is to identify both the information needed for assessment and the needs of a female client.

FORMS

The **Treatment System Overview** is used to set the stage for the interview. This form gives basic information about the treatment project so that all group members have a common frame of reference. The interviewers assess the client's needs and later (if there is time) discuss whether they think her needs can be met through this treatment system.

The **Client History Form** provides basic information about the client. It gives the interviewers data they can use to formulate their assessment questions; it gives the client some data from which to develop her characterization of the client.

To assist the client-volunteer in developing her characterization, she should be asked to fill out the **Client Needs Form** before the interview. This will help her focus on the needs and problems of the client she's playing and will help her to remain in the role during the exercise.

After the interview, each small-group member fills out the Client Needs Form. Then the small group writes a composite list on newsprint to help them compare and analyze their perceptions of the client. This is then compared with the client's perceptions of her needs.

Because each small group uses the same forms, a common frame of reference is established for the large group discussion that concludes the exercise.

To ensure that the small groups have as similar an experience as possible, it is extremely important that you discuss how each of you will conduct this exercise. While the small groups are reassembling in the large group meeting room, you should meet briefly with the other trainers to review what each covered in the exercise.

In the process of this exercise several things happen:

1. Since each trainee has an opportunity to interview the client, the exercise reveals a sample of the various interviewing styles used by small-group members. This provides experiential data that can be referred to throughout the course when examining (a) the effects of interviewing styles on clients, (b) the problems in eliciting information from clients, (c) the interactions between counselor and client, and (d) the ways in which the client is stereotyped (as perceived by either counselor or client). You should point out:
    - The way in which information is transmitted and interpreted and how it affects assessment of the client
    - How interviewing styles influence the amount and kind of information given by the client in the interview
2. As small group members discuss their own perceptions and the client's perceptions of her needs, they become aware of information they have missed, assumptions they have made, and conclusions they have drawn in interpreting the interview data. This assists trainees to sharpen their assessment skills.

Trainees will further develop these skills in Modules IV and V when they analyze videotaped interviews.

PURPOSE: To give trainees practice in assessing client's needs

TIME/ CODE | **INSTRUCTIONS: ASSESSMENT INTERVIEW EXERCISE**

10:15-11:45

III-C

Title

ASSESSMENT INTERVIEW EXERCISE

Space Requirements

- One large-group room
- Two small-group rooms

Seating Arrangement

Each small group sits in a circle. In the center of the circle there should be two empty chairs: one for the client and the other for the interviewer.

Materials

- Client Histories
- Client Needs Forms
- Treatment System Overviews

Trainer Instructions

- Define "need" and "problem":

  "Need" is a lack of something necessary, desirable, or useful; implies urgency.

  "Problem" is a complex, unsettled question; a source of worry or concern.

  Adapted from *Webster's Dictionary*

- Explain the exercise.

  The exercise is a simulation of the first of a series of assessment interviews with a female client. The purpose of the interview is to identify the client's needs and problems. At the end of the interview, trainees will be asked to describe those needs and problems.

- Give instructions for the exercise.

  Trainees will be divided into three small groups. Each small group will participate in a role play to assess client needs. A volunteer will play the client. The other trainees in the small group will act as counselor-interviewers, each having four minutes to interview the client. Each interviewer should build upon information obtained by past interviewers. After all the trainees have interviewed the client, the group should have enough information to identify the client's needs and problems.

TIME/ CODE	INSTRUCTIONS: **ASSESSMENT INTERVIEW EXERCISE**
10:45- 11:45	• Divide trainees into three small groups; assign a trainer and small-group room to each.
	• Take small group to assigned room.
III-C	• Select a volunteer to be the female client. Explain to group that for the next five minutes you will be working with the volunteer to help her establish her role.
	• Give trainees the Client History and Treatment System Overview to read while the volunteer and trainer are out of room.
	• Ask each trainee to think about four questions she would want answered in an assessment interview.
	• Take the client volunteer outside the large-group room to prepare her for the exercise; give her the Client History to read.
	• Discuss how she will play the part of the client.
	• Caution the volunteer to wait until the third interviewer before she *fully* states her problems.
	• Review the Client Needs Form with the volunteer. Ask her to fill it out, and then copy it on newsprint. (This will help strengthen her characterization.)
	• Review with the small group their role as counselor-interviewers. In order to have every trainee participate, the interview will be divided into four-minute segments, each segment having a different person as interviewer. Each interviewer is to build on the information obtained by prior interviewers.
	• Review the Client Needs Form in trainees' workbooks.
	• Tell trainees to take notes on the needs and problems of the client as they are disclosed during the interview.
	• Select a group member to be timekeeper (or take the role of the timekeeper yourself).
	• Select a group member to be the first interviewer; start the role play; continue around the circle to the right to select the next trainee to play the interviewer.
	• After the role play is finished, give trainees five minutes to write out the client's needs and problems and write a composite list on newsprint.
	• While the small-group members are writing their observations, take the "client" outside of the room and help her get out of the role she played.
	• In the small group, review the client's description of her needs (written on newsprint).
	• Discuss the client assessments.
	• Ask trainees to compare their assessment with the client's assessment of her needs. How do they differ? How are they similar? Why? What happened in the interview? Can the treatment system meet the needs expressed by this particular client?
	• Facilitate the discussion to explore the ways in which the female addict is stereotyped. Did participants stereotype the client? How does stereotyping of female clients take place in treatment programs?
	• Discuss the ways in which stereotyping occurs in treatment programs.

CLIENT HISTORY

Form III-C-1

Name:	June Dendy
Age:	28
Marital Status:	Separated
Number of Children:	2 girls, 8 and 10 years
Drug of Choice	Heroin
Employment Background:	Clerk typist, Salesgirl, Waitress
Present Employment:	None

Client got pregnant with first child during senior year in high school. Dropped out of high school and got married. After her second child was born client went to night school to get her high school diploma. History of marital problems--husband drank and was verbally abusive to client and children. Separated from husband five years ago. Client moved in with her mother and held various jobs to support herself and children. Client's mother currently is taking care of both children.

Client has been unemployed for seven months, during which time her heroin habit has gone from moderate to severe. While she was employed, she was using heroin once or twice a week, for about three months. When in high school, she had tried grass and pills several times but had stopped when she discovered she was pregnant. But, during the last few months of her employment, she began using heroin on a daily basis, and selling "hot" merchandise at her job to supplement her income. She says Frank, whom she met six months ago and has been dating regularly since, encouraged her to use heroin more often, saying she could support her habit by fencing his stuff. Although she was never caught, she was afraid, and her fear was one reason for her leaving her job.

Since leaving her job, she has devoted most of her energy to fencing stolen goods around the neighborhood and prostitution. Her mother is becoming increasingly resentful of caring for the children, and is putting pressure on June to get treatment and get a job. June feels that her mother is being unreasonable, but does recognize that getting off heroin is a good idea. She feels at loose ends when not on dope, but, more importantly, she's worried about getting busted, especially since Frank was busted three weeks ago for housebreaking.

She says she's really scared and wants help getting herself together.

FORM III-C-2

TREATMENT SYSTEM OVERVIEW

METHADONE TREATMENT PROGRAM

TYPE OF PROGRAM--Private, nonprofit program under direction of the County Regional Drug Abuse Commission. Provides 90 percent of its outpatient care to narcotic addicts and provides inpatient care through General Hospital, which also works with other area drug abuse programs. Center located in a converted residence.

SERVICES--Methadone maintenance, medical-surgical treatment. Also: chemical and drug free detoxification, crisis and legal intervention, educational and family counseling, encounter and self-awareness groups, other group interaction, group and individual therapy, vocational training, job placement, meditation, recreational therapy, social services, supervised work assignments, therapeutic community, Big Brother and Big Sister Program, referral.

ADMISSION--Must reside in county, be 18 or over, and have no severe medical or psychiatric problems. Hospital patients must meet OEO poverty criteria.

CLIENTELE--All age groups 18 and above but predominantly 21-28. Greatest number use natural opiates, but some abuse of all drugs except tranquilizers. Majority unemployed, unskilled.

STAFF--(Combined personnel of Center and Hospital working with Methadone Treatment Program) Full time: psychologist, 3 R.N.s, business administrator, 3 counselors. Part time: 2 psychiatrists, physician, 2 vocational rehabilitation personnel, program administrator, 2 pharmacists, community worker. Volunteers, part time: physician, psychologist, R.N., nursing aide, 3 paramedics, 22 counselors, 5 clergymen, pharmacist, 2 public education personnel. Former drug abusers: full-time caseworker, part-time caseworker. Center budgeted vacancies: psychologist, R.N., 3 counselors.

Form III-C-3 **Your Role:** ____

CLIENT NEEDS FORM

In the space above, write whether you are acting as the client, or as an interviewer. State your assessment of the client's needs based on the information obtained in the interview.

CLIENT NEEDS

THIRD PARTY PAYMENTS

The module you have been given is Module I: Introduction to Third Party Payments. Please read it carefully.

Your trainee population is composed of twenty-five people ranging in age from twenty-six to forty-five. Seventy-five percent of the participants have said that they've had experience in either planning to obtain or in attempting to obtain third party payments.

SESSION 1

LEARNING OBJECTIVES

The purpose of this session is to establish an appropriate learning environment by outlining the course content, explaining the course structure and providing a general explanation of the third party payments system.

At the end of this session participants will be able to–

- define "third party payments";
- identify the three parties in a third party payments system;
- identify at least five implications for a drug abuse treatment program seeking third party payments ;
- identify the two methods by which service providers are reimbursed in a third party payments system;
- identify the two types of third party payers.

SESSION: 1

SESSION REQUIREMENTS	
PERSONNEL	Trainer
TIME	2 hours
EQUIPMENT	Chalkboard Flip chart easel
MATERIALS	Pretests Prepared flip charts (F-1, F-2, F-3) Note pad and pencils for each participant Handout H-1 (Sample Daily Schedule)
FACILITY	Large-group meeting room

Session 1: INTRODUCTION

TIME/ FORM	MATERIALS & EQUIPMENT/ REFERENCES	ACTIVITIES
30 min. LG	Pretest	PRETEST
		● Administer pretest.
15 min. LG M-L/D	Chalkboard	INTRODUCTION
		● Introduce each trainer/facilitator.
		● Explain purpose of the course:
		This course is intended to provide information that will help you (a) assess feasibility of obtaining Third Party Payments and (b) determine required actions for obtaining TPPs. (Write on chalkboard.)
		● Note that the course provides guidelines but cannot specify each step required to obtain TPPs.
	Handout (H-1) (Daily Schedule) Flip Chart (F-1)	● Outline the course content and daily schedule. *(Write on newsprint and see sample flip charts at end of activities sheets.)*
		● Discuss the logistics *(when, where, any rules).*
		● Answer any questions.
15 min.		WARM-UP EXERCISE
		● Explain purpose of the exercise:
		This exercise should help you become acquainted with each other.
		● Use whatever technique you have found to be useful to help trainees identify names and/or other associations *(e.g., treatment modality represented).*
45 min. LG M-L/D		INTRODUCTION TO THIRD PARTY PAYMENTS
		● Define third party payments:
	p. 17	*A third party payment is a payment for a service provided to an individual by an individual or organization that neither receives nor provides the service.*

TIME/ FORM	MATERIALS & EQUIPMENT/ REFERENCES	ACTIVITIES
		INTRODUCTION TO THIRD PARTY PAYMENTS (CONT'D)
	p. 18	● Explain key terms: client *(service recipient)* provider *(service provider)* third party *(e.g., John Hancock Co., Medicaid).* service *(assistance given to client)*
	Flip Charts F-2, F-3	● Explain interrelationships among client, provider, and payer. *(See sample flip charts)*
	Figure 1.1 Figure 1.2	● Distinguish types of third party payers: *Public reimbursers* Federal/state programs supporting services to various categories of individuals, i.e., Medicaid, Medicare, title XX, Vocational Rehabilitation, etc. *Private reimbursers* Profit making *(e.g., Aetna, John Hancock)* Nonprofit *(e.g., Blue Cross/Blue Shield)*
		● Discuss the fact that public reimbursers presently provide most payments for addicts.
		● Note that to obtain TPPs, the eligibility of the client, provider, and service must be established.
		● Mention that each type of eligibility will be discussed in greater detail in a later session.
		● Note some of the difficulties existent within the third party payment's system, for example: Federal regulations regarding eligibility vary considerably between programs. State criteria vary between states and within each program *(i.e., no two states have the same set of criteria for Medicaid).*

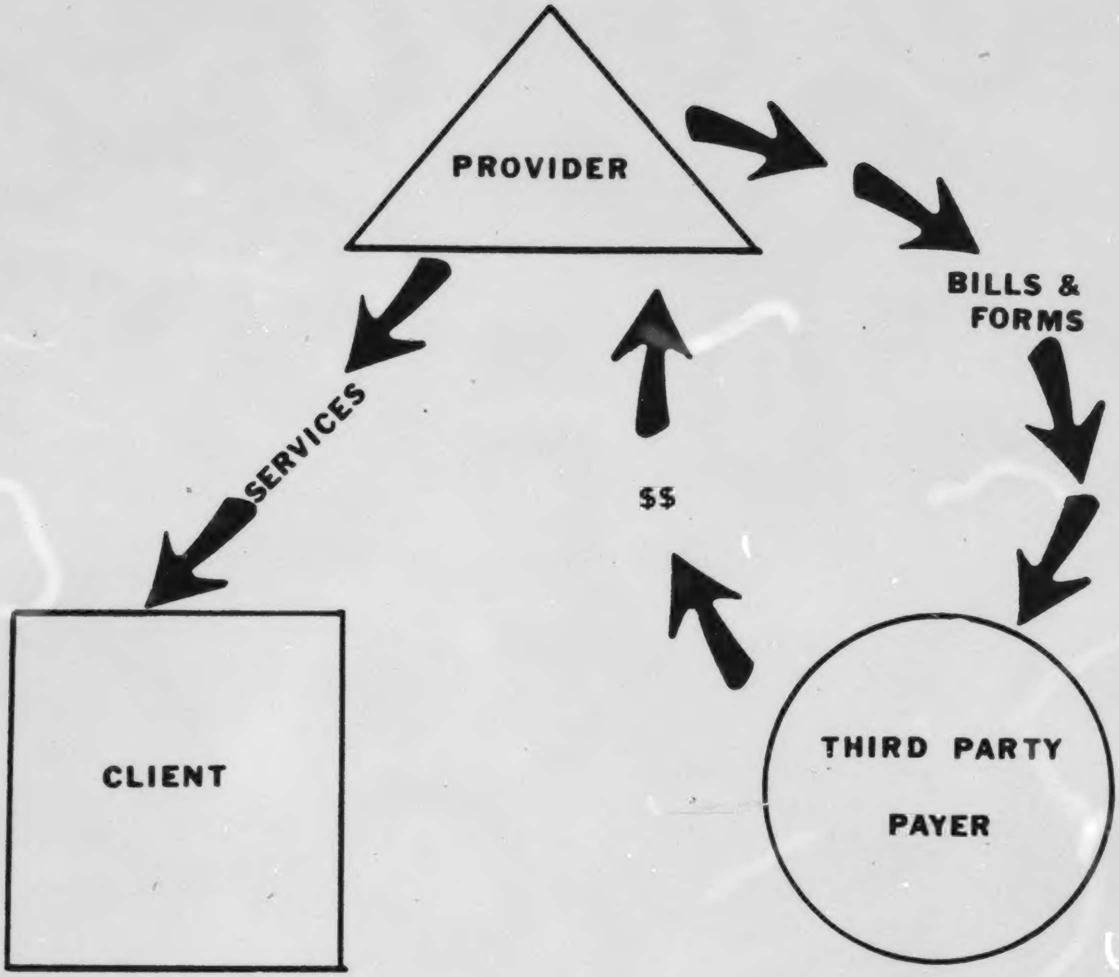
TIME/ FORM	MATERIALS & EQUIPMENT/ REFERENCES	ACTIVITIES
		INTRODUCTION TO THIRD PARTY PAYMENTS (CONT'D)
	pp. 23-26	● List some of the benefits offered a drug treatment program by third party payments, for example: Sources for required "match" funds Reduction of dependency on a single funding source Expansion or improvement of the program Preparation for National Health Insurance Improved program credibility
15 min. LG D		DISCUSSION ● Conduct discussion about implications for treatment programs of TPPs. *The purpose of this discussion is to help you identify important issues relating to TPPs (e.g., charging clients, staff requirements, confidentiality, record keeping, etc.)* ● Identify those issues that will be discussed in the course. ● Answer any questions.

COURSE CONTENT

- INTRODUCTION
- HSF REGULATIONS
- KEY ISSUES
- THIRD PARTY PAYERS
- CONFIDENTIALITY
- MANAGEMENT & STAFF ISSUES
- FINANCIAL MANAGEMENT
- PROJECT/SSA PLANNING

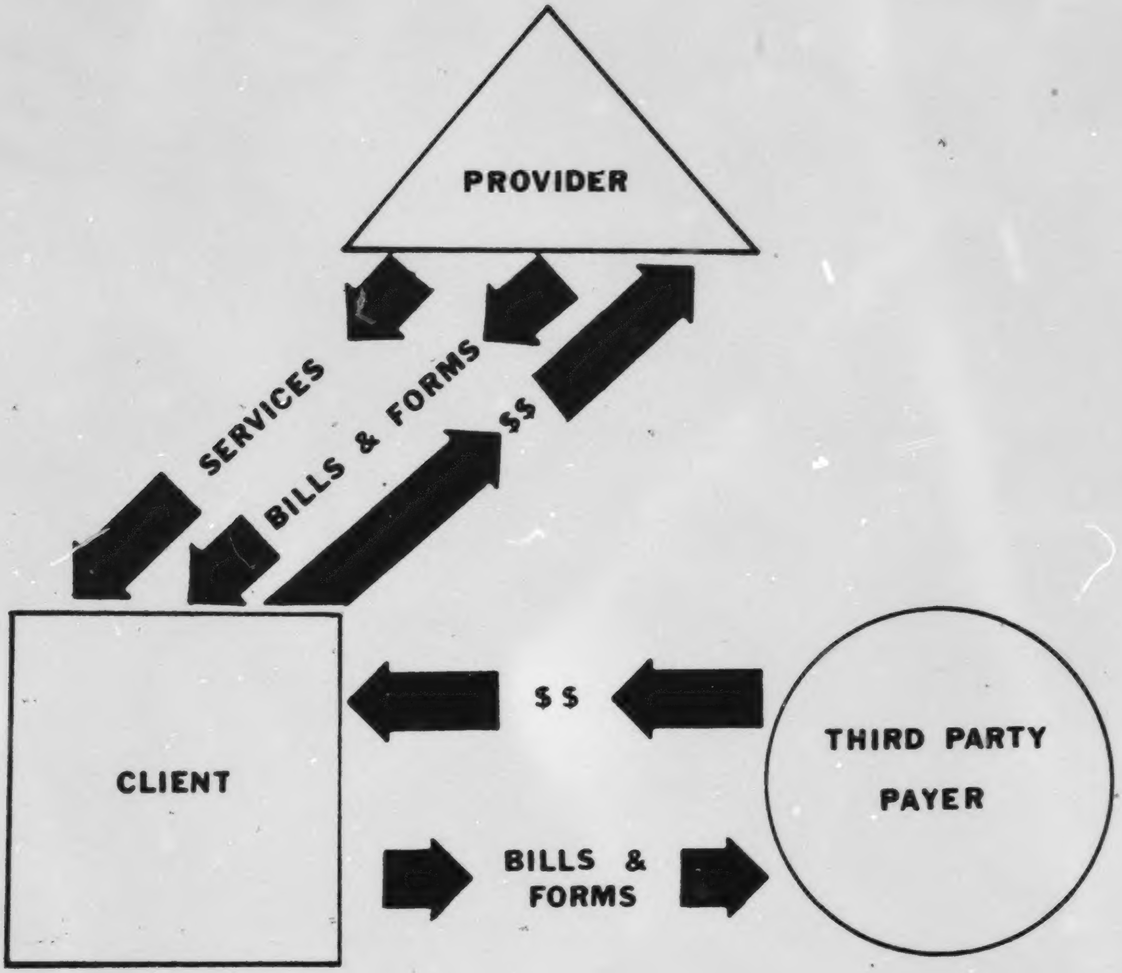
Sample Flip Chart F-1

DIRECT REIMBURSEMENT OF SERVICE PROVIDER


PROVIDER
BILLS & FORMS
SERVICES
$$
CLIENT
THIRD PARTY PAYER

Sample Flip Chart F-2

INDIRECT REIMBURSEMENT OF SERVICE PROVIDER


PROVIDER
SERVICES
BILLS & FORMS
$$
CLIENT
$ $
THIRD PARTY PAYER
BILLS & FORMS

Sample Flip Chart F-3

MODULE X: USING TRAINING MATERIALS

VOCATIONAL REHABILITATION IN THE TREATMENT SETTING

The module you have been given in Module 3: Understanding the Client. Please read it carefully.

Your trainee population is composed of sixteen men and women between the ages of eighteen and forty; one-third work with heroin addicts and the rest with either alcohol or polydrug abusers. All trainees are counselors. About half of the people work for small programs; they perform many funcitons including some job counseling. The remainder work for large treatment programs and perform job placement functions.

MODULE 3: UNDERSTANDING THE CLIENT (4 hours)

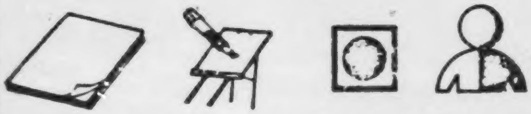
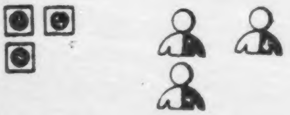
Focus, Objectives, and Resources

FOCUS	Module 3 focuses on factors, both internal and external to the drug abuser, that may contribute to drug dependency. It explores addict lifestyles, their meaning within the context of the drug subculture, and the implications that the addict's self-image, skills, compliance with subculture norms, and general behavior patterns have for vocational rehabilitation treatment planning. The learning activities address the importance of exploring, with the client, their prior lifestyle and assist the VR specialist in formulating questions that will elicit information necessary to effective vocational planning.
LEARNING OBJECTIVES	Upon completion of the learning activities in Module 3, trainees will be able to-- • describe at least three behavior patterns shown by rehabilitating clients that may cause problems in the vocational rehabilitation phase of treatment; • identify a minimum of two reasons why information about the client's lifestyle before drug use began, and in the context of the drug subculture, is important to the VR specialist in preparing a vocational rehabilitation plan; • list and describe six addict lifestyles recognized to exist within the street drug subculture; • identify at least four types of client information a VR specialist must obtain in order to develop a treatment or rehabilitation plan;
RESOURCES REQUIRED	The learning activities in this module require the following resources: • A copy of the resource paper, "Understanding Drug Abuse: Implications for Vocational Rehabilitation," for each trainee

- Five copies of each client profile
- A large training room and small group space for groups of approximately five trainees
- A trainer and two or three backup trainers or facilitators

MODULE 3: UNDERSTANDING THE CLIENT

Learning Activity Schedule

Activity 1 25 to 30 minutes	Trainer Presentation and Group Discussion The trainer's lecture provides a framework for identifying lifestyles, behavior patterns, psychological factors, and social factors that may contribute to chronic drug abuse. Group discussion encourages information-sharing and questions about experiences with drug abusers. Information generated here will be used by trainees as the basis for Learning Activity 2.
Resources Required	
Activity 2 3 hours 30 minutes	Identifying Client Lifestyles, Behavior Patterns, and Social History Information It is essential to identify the information the VR specialist must collect during the client assessment phase in order to define a feasible treatment, or vocational rehabilitation, plan. Using information developed in the first learning activity and the client profiles provided with this module, trainees will brainstorm in small groups to 1) fully identify the information a VR specialist must collect to create a feasible treatment, or vocational rehabilitation, plan and 2) formulate and list the questions that must be asked in order to obtain the necessary data from the client and from other sources. The questions developed by the groups will be used in Module 4, "Principles of Effective Interviewing."
Resources Required	 Client Profiles 1, 2 and 3

MODULE 3: UNDERSTANDING THE CLIENT

Trainer Guidelines

Activity 1 25 to 30 minutes	Trainer Presentation and Group Discussion 1) Briefly describe the learning objectives and sequence of activities for Module 3. 2) Present a brief lecture based on the resource paper, "Understanding Drug Abuse: Implications for Vocational Rehabilitation." 3) Facilitate group discussion by encouraging input based on the trainees' experiences and any questions they want to raise. 4) Be sure each trainee has a copy of the resource paper.
Activity 2 10 to 15 minutes	Identifying Client Lifestyles, Behavior Patterns, and Social History Information PHASE I 1) Remind trainees of the objectives for Module 3 and briefly summarize what follows. 2) Ask trainees to divide into groups of no more than five. Each group will use its own client profile (e.g., Group A uses Client Profile 1, Group B uses Client Profile 2, and Group C uses Client Profile 3). If additional client profiles are needed, the trainer may prepare them using those provided as guides, or permit more than one group to work with the profiles included here. 3) Assign a backup trainer or facilitator to each group or be prepared to float among the groups. 4) Have trainee groups move to small group areas.

2 hours
50 minutes

PHASE II

1) Request trainees to identify general and specific categories of information a VR specialist needs to obtain for effective vocational rehabilitation planning for the client identified in their group's profile. Record information categories on flip chart. General categories include school history, criminal record, health, employment history, vocational interests, and personal goals. More specific information might include:

- Client self-perception within the drug subculture
- Means used by the client to support habit
- Adjustment in the treatment program
- Interpersonal skills
- Self-concept
- Avocational interests and skills
- Level of motivation for job training or education
- Skills thought necessary to feel competent

2) Using the list of categories, assist the group in discussion of the following questions:

- What information generated in this activity is necessary for treatment planning with this particular client, and why?
- What information would be useful, but not absolutely necessary?
- Which of the information needs identified can best be obtained by means of an interview with the client?

NOTE: LIST ON THE FLIP CHART THE INFORMATION CATEGORIES THE GROUP IDENTIFIES AS "NECESSARY," "NOT NECESSARY," AND "BEST OBTAINED THROUGH INTERVIEW WITH CLIENT."

10 minutes — STRETCH BREAK. Following the break, trainees return to small groups to continue the activity.

3) Have each group member select one information category (e.g., drug history) and write a minimum of five questions that might be asked of his particular client in a personal interview. Ask trainees to keep their lists of questions for use in Module 4.

NOTE: IF TIME ALLOWS, QUESTIONS MAY BE SHARED BY TRAINEES WITHIN THE GROUP.

4) Ask the group to select a representative to report the following:

- The types of information identified by the group as necessary for treatment planning with the particular client and why they are necessary
- The types of information considered desirable, but not essential
- The types of information that can best be obtained by means of a personal interview with the client

5) Ask trainees to reconvene in the large group.

20 minutes — PHASE III

1) Have each group's representative report the areas the groups have determined to be important for VR planning with their particular client and explain why these areas were chosen. Post each list (recorded by the groups on flip charts) as the representatives report. Reinforce the group's responses whenever possible by connecting the need for information in treatment planning to the lecture materials.

2) Summarize the points covered during the session and review the learning objectives. You should stress the importance of--

- understanding the client's previous lifestyle in preparing the VR plan;

- assessing and capitalizing on the client's existing skills;
- those internal and external factors that contribute to drug abuse;
- personal interviews to obtain information needed to develop a VR plan for the client.

3) Explain that the information generated in this activity will be used to practice interviewing skills in Module 4.

4) Respond to any questions the trainees want to raise.

SUMMARY OF COURSE

Think about one thing you have learned that you consider most valuable and one thing that you consider least valuable to discuss with the group.

Use the space below for any notes.

SELECTED BIBLIOGRAPHY FOR "USING MEDIA"

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SELECTED BIBLIOGRAPHY FOR "USING MEDIA"

Bretz, Rudy. A Taxonomy of Communication Media. Englewood Cliffs, New Jersey: Educational Technology Publications, 1971.

Intended as a definitive study conducted by Rudy Bretz for the Rand Corporation. A systematic and well researched book. Mr. Bretz's overview of the media explores the general aspects of individual media, while offering specific information for media design and utilization. He defines media and deals with local versus central production of program software in instructional media systems.

Electro-Voice Microphone Primer. Buchanan, Michigan: Electro-Voice, Inc.

Brief descriptions of different types of microphones and their uses. If you have little knowledge of microphones, this primer will serve your needs. This book may be a plug to purchase electro-voice microphones, but serves well as a resource also.

Kemp, Jerrold E. Instructional Design - A Plan for Unit and Course Development. California: Fearon Publishers, 1971.

This book is broken into three parts, plus Appendix. The book's first part presents some questions that indicate concern and frustration with present instructional practices and their results. The second part examines each step of the instructional design plan. Some steps are treated briefly while other steps require more extensive explanation. Part three deals with mechanics that will help in planning, personal requirements, and working relationships, and some ideas for measuring the effectiveness of the plan. The Appendix offers five sample topics selected to illustrate the eight steps of the instructional design plan.

Kemp, Jerrold E. Planning and Producing Audiovisual Materials. San Francisco: Chandler, 1968.

Complete technical guide on the construction of visual materials. Deals with the various forms of visual materials such as graphics, slide, and overheads, comparing them by the strengths and limitations of each media.

Mattingly, Grayson and Smith, Welby. Introducing the Single Camera System. Washington, D.C.: S & M Productions Ltd., 1971.

This is a well thought out and easy to follow introduction to video tape and video tape systems. It contains sections on hardware (equipment), its uses, maintenance, trouble shooting tips, all in non-technical language. A glossary of terms is also contained. It should provide adequate information for your video needs.

McCluhan, Marshall. *Understanding Media: The Extensions of Man*.
New York: McGraw Hill, 1964.

McCluhan's book deals with the effects of media on contemporary society. He presents sections on television, film, hot and cold media, laying out his materials and ideas in piecemeal fashion.

Nisbett, Alec. *The Technique of the Sound Studio*. New York:
Hasting House, 1972.

A comprehensive book on audio. The basics of audio are explained from the single microphone, its placement and characteristics to the sophisticated audio system. Its scope and spectrum of audio considerations will furnish any reader with information applicable to individual needs.

Shamberg, Michael and Raindance Corporation. *Guerilla Television*.
New York: Hold, Rinehart and Winston, 1971.

One of the first books dealing with half-inch video. Some of its information is dated, due to the ever-changing state of the technology, but its strongest points are its view of half-inch video as a medium of individuals not conglomerates. *Guerilla Television* is a primer for media innovators today.

Stottiswoode, Raymond. *The Grammar of Film: An Analysis of Film Techniques*. California: University of California Press, 1950.

A basic book for anyone interested in film as art form, educational tool or if you want to know something about the medium. Offered in readable terms, providing an understanding of the basic elements of film and its terminology.

Vael Ker, Francis and Ludmila, eds. *Mass Media: Forces in Our Society*. New York: Harcourt Brace Jananovich, 1968.

A collection of articles on mass media covering theories and practices of the print media, electronic media, the roles of media in society today.

Video Freex. *The Spaghetti City Video Manual*. New York: Praeger
Publishers, 1973.

Includes sections on hardware (equipment), introduction to various types of systems, notes on editing, production systems, maintenance, basic and advanced, written in easy to read language. Not so technical as to confuse, but thorough in its approach and useful just to have around.

Weisgerber, Robert A., Ed.D. Instructional Process and Media Innovation. Chicago: Rand McNally and Company, 1968.

Offers representative viewpoints on the educational process and its development through new methods. The five major topic headings are inducing change in the learner, media and educational level, program perspectives and media considerations, developing technology of media systems and utilization and integration into instructional process.

PERIODICALS

Association for Educational Communications and Technology.

AV Communication Review. Washington, D.C. Articles concerned with the growing industry of educational technology: often present an academic viewpoint to using media.

Audio Visual Instruction. Washington, D.C. Published ten times each year, articles generally are centered around the state of the art in educational design and new equipment updates.

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GLOSSARY

ACCEPTANCE NEEDS: a phrase referring to an individual's desire to be liked and accepted.

ACCOUNTABILITY: responsibility. In training, accountability requires that the desired results be specified (in behavioral terms) and that responsibility for achievement of the behavioral objectives be assumed by both trainers and trainees.

ACHIEVEMENT NEEDS: a phrase referring to an individual's desire to successfully perform tasks. (See TASK-ORIENTED.)

ACHIEVEMENT TEST: a test designed to measure the amount of information acquired in specific content areas.

ADAPTIVE: showing ability to adjust to the environment. The term was originally used to describe an individual; it is now also applied to groups and organizations. Generally, this term is used to summarize a number of specific actions or events that indicate an individual's ability to adjust to his environment.

AFFECTIVE LEARNING OBJECTIVE: a behavioral objective requiring a change in attitude, values, interest, appreciation, motivation, etc.

AMBIVALENCE: simultaneous attraction toward and repulsion from an object, person, or action. When one says he is ambivalent, he may mean that his feelings are mixed or that he is confused.

ASSESSMENT: estimate, appraisal. The first step in the training process, an assessment is made to identify the training needs.

AUDIENCE REACTION TEAM: generally consists of two to five participants who react to a presentation.

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BACK HOME: jargon used in training to refer to the job or situation from which a participant has come and to which he will return. One might speak of "back-home" problems.

BEHAVIOR CHANGE: a change in the way one conducts oneself, used in training to refer especially to a desired change in job performance.

BEHAVIORAL OBJECTIVE (also LEARNING or PERFORMANCE OBJECTIVE): a specific statement of the change in knowledge, skill, or attitude expected as a result of training. It should be stated in terms of performance and should be measurable. Behavioral objectives must include a description of the expected behavior, the criteria (to what degree of proficiency the learner should perform the behavior), and the conditions under which the behavior will be demonstrated. Sometimes behavioral objectives are categorized as enabling and terminal objectives (see ENABLING OBJECTIVE and TERMINAL OBJECTIVES).

BRAINSTORMING: a free-wheeling technique where creative thinking is more important than practical thinking. Participants spontaneously present ideas on a given topic. No idea is dismissed or criticized. Anything offered is written down. This technique is used to generate as many ideas as possible; participants stimulate each others thinking. After the listing of ideas is completed, the group clarifies, categorizes, or discusses one item at a time --depending on the situation.

BRIDGING ACTIVITIES: activities that assist individuals to translate learning from one situation to another. For example, an action planning activity at the end of a training session serves as a bridge to the work environment.

BUZZ GROUP (SMALL-GROUP DISCUSSION): a technique that involves members of a training group directly in the discussion. The large group is divided into small groups of three or four persons each for brief discussions in which each trainee contributes his ideas.

CASE STUDY: a detailed account of a real or hypothetical occurrence (or series of events) about a problem. Usually the problem is one that trainees might encounter on the job. The case is analyzed and discussed and trainees are often asked to arrive at a plan of action to solve the problem. Case studies can be presented verbally, in writing, on film, or with any combination of media.

CLINIC: a meeting or extended series of meetings involving analysis and treatment of specific conditions or problems.

CLINICAL: an orientation toward reality usually involving a desire to deal with wholes and concrete facts, rather than with parts and concrete facts. A clinical orientation usually involves an attempt to solve problems rather than to merely analyze them.

CLOSED-LOOP SYSTEM: a system that continually functions in its established pattern.

CLOSURE, Need For: a need to see something finished, or brought to a logical conclusion. Sometimes it is used in describing a person who seems to be uncomfortable with ambiguity and uncertainty.

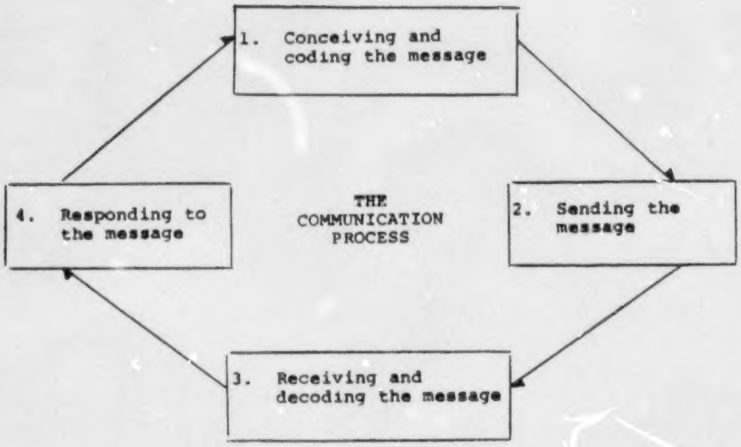
COGNITIVE APPROACH: an approach involving knowledge and perception. This term is applied to an intellectual rather than emotional approach.

COGNITIVE LEARNING OBJECTIVE: a behavioral objective that requires trainees to remember facts, figures, methods, policies, etc., or to solve some intellectual task, by determining the essential problem and reordering or combining the information with previously acquired knowledge.

COLLOQUY: a modified version of a panel consisting of three or four resource persons and three or four trainees. The trainees express opinions, raise issues, and ask questions that will be discussed by the resource persons. (See PANEL.)

COMMITTEE: a committee consists of a small group of trainees selected to fulfill a function or perform a task that cannot be done efficiently or effectively either by the entire training group or by one person.

COMMUNICATION: the four-step process of giving and receiving messages, as shown in the figure below.


1. Conceiving and coding the message
2. Sending the message
3. Receiving and decoding the message
4. Responding to the message
THE COMMUNICATION PROCESS

CONFERENCE: a meeting of people in large or small groups. The participants usually consult together in a formal fashion on problems to which they give the most serious consideration.

CONFRONTATION: the process by which one person attempts to make another person aware of aspects of his own behavior, usually without consideration of that person's desire for feedback. The phrase, "a confronting style," is sometimes used to describe a person who habitually gives such feedback to others.

CONGRUENT: in agreement with, fitting, or appropriate. (For example, if you are teaching people how to write behavioral objectives then the behavioral objectives of your training session must be congruent with the criteria you teach.)

CONSORTIUM: an association, society.

CONSULTANT: a resource person; one who has special skills or expertise in a specific area and brought in temporarily to assist in training or other activities.

CONSULTATION: a discussion between two or more people in which one of the people provides technical assistance. Included are telephone conversations, letters, and on-the-job visits. (See TECHNICAL ASSISTANCE.)

CONTENT: the subject matter--information, concepts, principles, or skills. Communication consists of two levels--content (*what* is being communicated) and process (feelings about oneself and others during the communication.)

CONTEXTUAL ELEMENTS: a group member's relationships outside the group. Contextual elements include physical and social contacts, emotional relations, contractual relations, and cultural interchange.

CONVENTION: an assembly of people from local groups who are members of a parent organization, either district, state, or national.

CORRESPONDENCE COURSE: a self-instructional course using print and/or nonprint materials as the educational media. Such courses may include tutorial or small-group sessions, consultations from a trainer, written assignments, examinations, and grades.

COUNTERDEPENDENT: a technical term in personality theory that refers to behavior that is overly independent. A counterdependent person consistently resists the authority, structure, and leadership of others.

COURSE: an organization of subject matter and related learning experiences provided for the instruction of trainees on a regular or systematic basis, usually for a predetermined period of time (e.g., a semester, a regular school term, or two-week workshop).

COVERT: hidden.

COVERT INTENT: the aim or purpose is not easily observable. Can refer to a behavioral objective in which the desired behavior is not necessarily visible, for example, thinking, adding, solving, discriminating.

COVERT RESPONSE: a reaction that is not necessarily visible, for example, discriminating, understanding, and fantasizing.

CRITERION TEST: a test designed to measure mastery of a behavioral objective based on a predetermined standard of achievment. This test focuses on job performance capabilities rather than on details of content that are not essential to job performance.

CRITERION TEST ITEM: a written and/or actual performance item that is used to measure the achievement of an objective and is based on a predetermined standard.

CRITICAL INCIDENT: a contrived or dramatized educational experience in written, audio, and/or visual form that simulates real-life events. It generally requires trainees to make decisions and act these out in a laboratory setting. It is often used to give trainees experience in handling interpersonal situations that may arise on the job. For example, the technique could be used to teach foremen how to handle a recalcitrant employee, or to teach interviewers how to obtain information from prospective employees.

CULTURE: a technical term with many definitions. It is used typically to refer to behavior characteristic of a group or class.

CURRICULUM: the planned course of study, involving trainee interaction with instructional content, resources, and processes for the purpose of attaining the behavioral objectives.

CURRICULUM DEVELOPMENT: a part of the training design process, involving selection of content, development of learning tasks, and organization of the content.

DEFENSIVE: resisting or preventing potential or actual aggression or attack.

DEMONSTRATION METHOD: a presentation that shows how to use a procedure or how to perform certain actions. Basically it is a visual presentation, accompanied by discussion, in which behavioral skills are taught.

DEPENDENT: Subordinate; relying on another for support; being influenced by or subject to another.

DEVELOPMENTAL TESTING: part of the validation process in which the training design is successively tested and revised to identify and correct weaknesses. Revisions are made after each test until the acceptable standard is achieved. (See FORMATIVE EVALUATION.)

DISCUSSION: a method in which a specific topic is talked about in a more or less structured way. It may take several forms--roundtable discussion, guided-group discussion, buzz groups, panels, brainstorming, etc.

DISCUSSION GROUP: a meeting of two or more people to informally discuss a topic of mutual concern. It is generally based on a common background achieved through assigned readings or shared educational experiences.

DISCUSSION STIMULATOR: anything used to bring about a discussion, such as a picture, a quote, a case study, a questionnaire, a list of ambiguous statements which trainees are asked to agree or disagree with, a true-or-false test, a tape recording, a statement, a movie, etc.

DOMAIN OF OBJECTIVES: an indication of the type of learner performance specified in the behavioral objective.

> **COGNITIVE OBJECTIVE:** those statements specifying the acquisition of particular knowledge or information.
>
> **AFFECTIVE OBJECTIVES:** those statements specifying the acquisition of particular attitudes, values, or feelings.
>
> **PSYCHOMOTOR OBJECTIVES:** those statements specifying the acquisition of particular muscular and motor skills.

DYAD: pair; two people.

DYNAMICS: the driving physical, moral, or intellectual forces of any area or the laws relating to them; the pattern of change or growth of an object or phenomenon.

DYSFUNCTIONAL: impaired or abnormal functioning.

EDUCATIONAL GOALS: are general statements of what the training should accomplish. They are developed from the needs assessment and are used to write specific behavioral objectives.

E-I-A-G PROCESS: a structured way of learning from experience that forms the basic model for the design of most training sessions. This four-step process is based on the concept that people learn best by being actively involved in their own learning. The learner has an *experience*, *identifies* the elements of that experience, *analyzes* why the elements occurred as they did, and *generalizes* about the knowledge and skills acquired in this specific situation so that they can be applied in other situations.

EMPATHETIC: from empathy; to be capable of participating in another's feelings or ideas.

ENABLING OBJECTIVE (ENROUTE, INTERIM): a specification of performance that is a part of, or prerequisite to, a terminal objective.

ENTRY PROCESS: jargon phrase for the highly complex set of conditions by which a consultant begins to exert influence. The entry process involves important actions separate from the main work of the consultant, although they are naturally closely related.

ENTRY-LEVEL SKILLS AND KNOWLEDGE: the level of skills and knowledge the trainee brings with him to training. Training should be designed to bridge the gap between the entry-level skills and the job performance requirements.

ENVIRONMENT: used to refer to the physical and social context within which any person, group, or organization functions.

EVALUATION: of training, involves the measurement of participants' reaction to the program, the learning gained, changes in job-related behavior, and tangible results of the training.

> **FORMATIVE EVALUATION:** yields information that is used during the development of a curriculum to help improve it.
>
> **SUMMATIVE EVALUATION:** is conducted after the curriculum is completed. It provides information about the effectiveness of the training and is the basis for course revision.

EXERCISE: (See STRUCTURED EXPERIENCE)

EXHIBIT: collections of related items displayed to facilitate the learning process or to carry an educational, informational, or inspirational message.

EXPERIENTIAL: a term for a kind of learning process in which the content is experienced as directly as possible, in contrast to being read about in a book or talked about in lecture and discussion. The term applies to a wide variety of training techniques.

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FACILITATE: to make easier; to help bring about. In training, to help bring about the maximum amount of cognitive, affective, and psychomotor learning.

FEEDBACK: a report to a person or a group about how the person or group affects the reporter. Feedback is a corrective mechanism through which a person or group learns how well behavior matches intentions.

FIELD TESTING: a stage in the validation process, following developmental testing, that involves trying out the training design on groups of trainees in field situations or in the work environment.

FIELD TRAINING: is training that is conducted in the actual work situation. It is used in conjunction with classroom instruction and allows trainees to apply what has been learned.

FIELD TRIP or TOUR: a visit by a training group to a place of educational interest for direct observation and study. Field trips usually involve less than four hours, while tours include visits to many points of interest and require from one day to several weeks to complete.

FISHBOWL: an experiential training technique in which some members of a group sit in a small inner circle and discuss a topic while other members sit in an outer circle and observe. It is useful as an intergroup training technique. Sometimes each member of the outer group is instructed to observe a particular member of the inner group.

FLIP CHART: a visual aid that consists of large sheets of paper mounted on a pad. (Each sheet is easily flipped over to reveal the next sheet.) Usually refers to collections of charts or illustrations used during demonstration-lectures. Also used to refer to blank pads of newsprint paper used instead of blackboard. Sheets are easily torn off and taped on walls for a record of discussion or lecture.

FOLLOW-UP EXPERIENCE: a phrase referring to a carefully planned activity that follows and reinforces training.

FORCE-FIELD ANALYSIS: a training technique for analyzing problems. It consists of listing, side by side, forces that seem to be helping and forces that seem to be hindering the achievement of a stated goal (or resolution of a problem). This listing helps to clarify and define the problem. In addition, possible strategies for dealing with the problem are usually made clear: those forces that help achievement of the goal should be encouraged or strengthened, while those that hinder this achievement should be eliminated or weakened.

FORMATIVE TESTING: testing of trainees during the training process that measures the degree of attainment of the behavioral objectives.

FORUM: an assemblage of trainees where everyone has an opportunity to express his views. This expression of views is used to facilitate discussion after a topic has been introduced by a speaker, panel, film, or other technique.

FREE DISCUSSION: a discussion that encourages the expression of attitudes and values. The purpose of this discussion is to recognize and clarify differences within the group so that they can be reconciled.

FREEING-UP: jargon, referring to the process by which an individual is able to become less defensive, more open, more "free." It is related to Kurt Lewin's use of the term "unfreezing" to describe the first step in any change process.

FRONT END ANALYSIS: (See NEEDS ASSESSMENT)

FUNCTIONAL: that which facilitates the attainment of goals.

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GAMES: may refer to various techniques used to make certain phenomena more real and immediate. For example, games have been employed to simulate conflict, bargaining, leadership struggles, group norms, etc.

GATEKEEPING: a term used in group dynamics to describe a person who regulates interaction patterns by asking people for their ideas, suggesting to others that they talk less, etc.

GESTALT: a school of thought in psychology. Phenomena are studied and interpreted as patterned wholes rather than as aggregates of parts. It has had major effects on contemporary personality theory. It is now used as a shorthand way of referring to an overall view of anything: a "big picture" approach, e.g., "My gestalt on the issue is...." It is also used increasingly to refer to a collection of techniques that are purported to help people identify and then reorganize their own view of reality.

GOAL: a general statement of what the training should accomplish. Goals are developed from the needs assessment and are used to write behavioral objectives. (See also EDUCATIONAL GOALS.)

GOAL-SETTING: to establish the aim, or desired result of training.

GROUP: three or more persons who share the following characteristics:

- The members think of themselves as a group with an identifiable membership.
- They share a common purpose.
- Each member's contributions are valued.
- An open and trusting climate develops.
- The members pay attention to how they work together.
- They can, when they choose to, act together as a single entity.

GROUP DYNAMICS: the study of the forces at work within a group that affect the way it works.

GROUP MAINTENANCE: those behaviors exhibited by group members that help maintain harmonious working relationships among members.

GROUP PROCESS: the actual behavior in a group. It is concerned with *how* things happen (who talks to whom, how decisions are made, how the group handles conflict) rather than *what* is talked about.

GROWTH: a widely used term, reflecting theorists' and practitioners' concern for improvement in personal, group, and organizational behavior. It is constantly in danger of becoming an ideological cliche Identification of growth stages, rates, and directions is a major focus of contemporary theory and research.

GUIDED-GROUP DISCUSSION: a structured discussion whose purpose is to cover certain predetermined areas or points. Using an outline or list of "discussion points," the trainer guides the discussion to be sure desired information is shared and discussed.

GUT LEVEL: jargon to describe statements involving feelings or emotions, as opposed to head level.

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HELPING RELATIONSHIP: derives from the "client-centered" therapies introduced by Carl Rogers and others. It is used to describe a relationship established to help someone increase his ability to cope. It is distinguished from other possible relationships that one could establish with another person, e.g., a casual friendship, etc.

HERE-AND-NOW: a phrase describing the temporal focus of attention, e.g., a focus on what is happening as it occurs.

INFLUENCE: the power to cause an effect on others in indirect or intangible ways. As a verb, to have an effect on the condition or development of something or someone.

INFORMATION SHEETS: commonly called "handouts." Information sheets are learning aids given to trainees in support of a presentation. They may be in narrative or outline form, written by the trainer, or copied from published materials.

INPUT: one's contribution to a system, particularly in the form of ideas.

INSTITUTE: an association; an educational institution; a meeting for instruction or a brief course of such meetings.

INSTRUCTION: a series of events that is designed to assist a trainee to change his behavior in order to meet specified behavioral objectives.

INSTRUCTIONAL AIDS: (See TRAINING AIDS)

INSTRUCTIONAL SEQUENCE: determination of the particular order in which skills and concepts will be presented during training. Decisions regarding sequencing are based on the previous analyses of the learner, task, and content.

INSTRUCTIONAL DEVELOPMENT: the application of research concerning the learner, the learning task, and the training delivery to the design and production of instructional products and the evaluation of these products according to prespecified criteria.

INSTRUCTIONAL GOALS: (See GOALS)

INSTRUCTIONAL DESIGN: (See TRAINING DESIGN)

INSTRUCTIONAL LEVEL: an indication of the general nature and difficulty of instruction, e.g., elementary instructional level, secondary instructional level, and postsecondary instructional level.

INSTRUCTIONAL MATERIALS: (See MATERIALS)

INSTRUCTIONAL MEDIA: (See MEDIA)

INSTRUCTIONAL MODULE: (See MODULE)

INSTRUCTIONAL OBJECTIVES: (See BEHAVIORAL OBJECTIVES)

INSTRUCTIONAL PACKAGE: everything needed to carry out the training. In self-instructional programs, this would include everything the trainee would need to proceed with the course.

INSTRUCTIONAL PRODUCT: any material or group of materials produced for instructional purposes; use of this term in educational technology is limited to items that can be reproduced.

INSTRUCTIONAL PROGRAM: (See TRAINING PROGRAM)

INSTRUCTIONAL SYSTEM: a system containing the following elements (activities):

- Needs Assessment
- Goal Development
- Statement of Behavioral Objectives
- Training Design
- Training Activity
- Evaluation
- Validation

INTERACTION: virtually any behavior resulting from interpersonal relationships. In human relations it includes all forms of communication, verbal and nonverbal, conscious and unconscious.

INTERPERSONAL: the generic term for relations between persons, usually two. It is a prefix for many phrases, such as interpersonal relations, interpersonal aspects, interpersonal conflict, etc.

INTERVENTION: an interruption of a group activity that influences the direction, content, behavior, or affect of the group.

INTERVIEW: a presentation in which one or more resource persons respond to questioning by one or more trainees. It is used to explore a topic in depth where a formal presentation is not desired by either trainees or resource persons.

JUDGMENTAL: expressing an opinion or evaluation that is believed or asserted.

LAB: a shorthand term for any of a wide variety of programs that derive from the "laboratory method of training," an approach that is primarily experiential. The term "lab" has been added to describe many types of training, e.g., "Conflict Lab," "Personal Growth Lab," etc.

LABORATORY METHOD: a basic training approach in which learning comes from both the task and the behavior of trainers and participants in the group. A central concept of the laboratory method is that feelings influence learning; therefore, this method of training attempts to deal with emotional reactions as well as with knowledge and skills.

LEARNER ANALYSIS: the identification of the intended audience for an instructional product, and of the significant traits, aptitudes, and proficiencies of that audience.

LEARNER TASK ANALYSIS: an identification of the main skills to be acquired by the learner and the breakdown of these skills into their basic components. It indicates the performance and knowledge requirements for a particular skill.

LEARNING: a change in behavior as a result of practice or experience. The change can be through acquisition of knowledge, attitudes, or skills based on learning in the cognitive, affective, or psychomotor domains.

LEARNING ACTIVITIES: actions or activities that result in an internalized change of behavior or response on the part of the person performing the actions or activities.

LEARNING CONTRACT: a plan of instruction, adaptable to individual differences, in which the course content is divided into a number of long-term assignments. The student receives a contract and is allowed to proceed from one step to the next as each is completed.

LEARNING DEFICIENCY: the difference between the minimum (criterion-referenced) level of performance required and the actual performance of the trainee prior to training.

LEARNING OBJECTIVE: (See BEHAVIORAL OBJECTIVE)

LEARNING PACKAGE: (Also called PROGRAMMED INSTRUCTION) a self-contained unit of study that enables the learner to move at his own pace to reach specified learning objectives.

LECTURE: a carefully prepared, formal, oral presentation of a subject by a qualified expert. An effective lecture will have a clear introduction, a clear summary, and will be limited to what is important.

LECTURE SERIES: a sequence of speeches extended over a period of several days or presented intermittently during several weeks or months.

LECTURETTE: a short informative talk on a limited subject during which questions and comments are discouraged. In training the purpose is usually to stimulate discussion, summarize preceding discussion, or comment on a specific event.

LEVEL OF PERFORMANCE: a predetermined degree of proficiency to be attained during training.

LISTENING TEAM: a team that listens, takes notes, questions the presenters, and/or summarizes a training session. The team is used to provide interaction between a speaker and the trainees and is especially useful where the speaker is not especially knowledgeable about an agency's unique problems.

LISTING EXERCISES: a form of discussion in which a group devises a list of ideas, concepts, etc., and discusses each item as it is suggested. The finished list constitutes a record and summary of the discussion.

MANAGEMENT-BY-OBJECTIVES: a management strategy developed by Odione that makes the establishment and communication of organization objectives the central function of a manager. It is based on the assumption that supervision and leadership will work best under conditions in which both superiors and subordinates have "contracts" (i.e., agreements) establishing directions, priorities, and objectives.

MASTERY: a demonstration of behavior by the trainee in which he shows that he has achieved a specified level of learning.

MATERIALS: anything used in the training process, for example, books, films, papers, or other training aids.

MATRIX: a chart that is used to display the relationship between variables.

MEASURE: a unit of measurement to which reference may be made for purposes of description, comparison, and evaluation.

MEDIA: any means of conveying an instructional message; a channel of communication used to facilitate learning, for example, television, videotape, printed test, graphics.

MEDIATED INSTRUCTION: instruction that is conducted with communications media rather than through direct interaction of the teacher with the student.

METHOD: a basic approach to instruction, for example, structure, lecture, site visit, programmed instruction, and small-group discussion.

METHOD, DEMONSTRATION: (See DEMONSTRATION METHOD)

METHODOLOGY: the organization of methods to achieve specific learning outcomes.

MINICOURSE: a self-contained instructional package dealing with a single concept or skill.

MODEL: a description or analogy used to help visualize something; an example for imitation or emulation.

MODULE: a unit of instruction that covers a specific content area within a given period of time. (See UNIT OF INSTRUCTION)

MOTOR OBJECTIVE: (See PSYCHOMOTOR OBJECTIVE)

NEED HIERARCHY: as described by Abraham Maslow, needs are arranged in a hierarchy from the most basic biological needs to more variable psychological needs. The highest level is Self-Actualization. The theory says that "higher" needs cannot be realized until "lower" needs are relatively satisfied. The theory has led to a variety of shorthand phrases for describing "where a person is" in the Need Hierarchy at a given time, e.g., "esteem level," "social level," "security level," etc. This particular theory was also the basis for McGregor's THEORY X--THEORY Y formulation.

NEEDS: a central concept in psychology, referring to all of the biological and psychological requirements for the maintenance and growth of the human animal.

NEEDS ASSESSMENT: an appraisal of the existing situation in the work environment, including any interpersonal problems or any lack in knowledge or skills on the part of prospective trainees. The final part of the process is an analysis of those needs to determine how they may best be met.

NEWSLETTER: a document that may include an announcement or report. It is mailed to many people and often carries training information. It is a trainer's way of personally communicating with many people.

NONDIRECTIVE: the name for a method of interviewing first introduced by Carl Rogers. He used it to refer to therapy in which the patient is in charge of the pace, content, and direction of the interchange. The term is now used to refer to any similar approach used by a person in authority, e.g., a teacher or trainer.

NONVERBAL: involving minimal use of language; being other than verbal. It has come to refer to a number of training techniques that do not use language, for example, body movement.

NORM: a principle of right action established by a group and binding upon the members of that group that serves to guide, control, or regulate proper and acceptable behavior. A standard by which members of a group are evaluated.

NORM REFERENCED: the assessment of learner performance in a given area in relation to the performance of some norm or reference group. This is distinguished from criterion referenced, which refers to assessment of performance based on an established standard or criterion. (See CRITERION REFERENCED)

OFF-SITE: away from the regular place of work.

ON-THE-JOB TRAINING: training that takes place while the trainee is actually doing his job under supervision. It differs from field training only slightly in that field training is usually part of a larger program in which trainees apply their training on the job, then return to the classroom to share and discuss what they have learned. (See FIELD TRAINING)

ON-SITE TRAINING: training conducted in the office or center where the trainees are based. On-site training is not the same as field training or on-the-job training where trainees are in an actual work situation.

OPEN-LOOP SYSTEM: a dynamic system with feedback capability that has a continuing influx and output of information.

ORIENTATION: adjustment and familiarization to a situation or environment, such as to a new job or new responsibilities.

OVERT: visible, manifest.

OVERT RESPONSE: observable behavior that is measurable; the level at which the learner can demonstrate a skill.

OWNERSHIP: jargon for the quality of feeling personally committed and hence presumably entitled to influence a situation, as in "I feel some ownership in this program."

PANEL: a training method involving a discussion among four to eight people on an assigned topic in front of the training group. Panel members are often experts in the field under study, but usually represent various backgrounds or opinions. A moderator ensures that order is maintained, that each resource person gets equal time, and that the topic is covered in depth.

PARTICIPANT (LEARNER, TRAINEE): the person for whom the training activity is created and to whom it is presented.

PARTICIPANT-OBSERVER: a group participant who acts as an observer for all or a portion of a training session. In this role he observes and records the activities of other members and then describes these to the group.

PARTICIPATORY TRAINING: training that involves all group members in activities utilizing two-way communication to enhance their learning.

PERFORMANCE STANDARDS: the absolute or comparative levels of behavior required to determine achievement of specified behavioral objectives.

POSTTEST: a type of test given at the end of a unit of instruction that measures the amount of information learned by the trainees during that session. The questions are based on the behavioral objectives and the course content for that unit. The word "posttest" can also be used to describe any type of evaluation measure given after training. These measures can be written, verbal, or a demonstration of skills. They are used to determine how well the trainees have attained the objectives and help identify what changes should be made in the training to improve it. The posttest may also serve as a diagnostic tool to identify remaining performance deficiencies.

PRESERVICE TRAINING: training provided before the trainees actually begin doing their jobs, as opposed to in-service training.

PRETEST: an assessment made before instruction to determine the level of knowledge or skill that a learner brings to instruction. The questions deal with the factual material that is included in the training program. Results are compared to those of the posttest to measure the amount of learning accomplished during training.

PROBLEM-ORIENTED TRAINING: training geared to the actual problems that face the people being trained; emphasis on practicality, not theory.

PROCESS: as a component of communication, the feelings about oneself and others during the communication. Also, a continuing development involving changes; a particular method of accomplishing a task, usually involving a number of steps. In training, process means the steps through which the trainees learn.

PROCESS ELEMENTS: internal and external influences that affect the group process.

PROGRAMMED INSTRUCTION: a self-instructional teaching format, using print and/or other materials as the training medium. Questions are ordered in such a way that correct knowledge is reinforced and mistakes or errors corrected. Examples include programmed textbooks, teaching machines, computer assisted instruction, and dial access information retrieval systems.

PROTOTYPE: a near-final model of an instructional product that is tested to determine what modifications of structure and performance are necessary. Based on the success of the prototype, decisions are made concerning the continuation and possible mass production or reproduction of the model.

PSYCHOMOTOR LEARNING OBJECTIVES: a behavioral objective emphasizing motor or muscular skills, or neuromuscular coordination, usually involving manipulation of material or objects.

QUESTION PERIOD: an organized follow-up session to a lecture or speech in which trainees ask the lecturer questions. It is during this time that trainees ask for clarification of points made in the formal presentation, and ask for information that was not covered by the speaker but is of interest to them.

REACTION PANEL: several trainees placed between the lecturer and the audience and to the side of the lecturer. This panel asks questions during the lecture to clarify the speaker's points. After the lecture, they present their reactions as a group. This is a device to encourage audience involvement in the lecture.

RE-ENTRY: jargon for the process of moving back into one's work situation from a temporary training situation.

RESULT DEMONSTRATION: a demonstration that shows by example the concrete outcome of a practice. It often deals with operational costs, production procedures, or with the quality of a product, and generally requires a considerable period of time to complete.

ROLE: a position assigned or assumed; a function.

ROLE PLAYING: a training technique in which a small group of trainees acts out a real-life situation in front of the other trainees. Role playing may be rehearsed beforehand in order to produce a specific effect; it may be spontaneous in order to allow the trainees to define their roles within a specific situation; or it may be structured by the trainer, who will assign specific roles to the trainees. There is no script. Those trainees not assigned a role discuss the performance in relation to the situation or problem under consideration. The trainer also offers criticisms and suggestions.

ROUNDTABLE DISCUSSIONS: discussions usually involving eight to twelve participants, all of whom are considered equally "expert." The leader may or may not be the trainer. The leader's role is limited to monitoring participation and keeping the discussion focused on the topic.

SELF-ACTUALIZATION: a phrase quite widely used to refer to the process by which an individual reaches the highest level of functioning of which he is capable. More concrete definitions are difficult in that, theoretically, self-actualization is different for every person. Self-actualization is the top level in Maslow's need hierarchy. (See NEED HIERARCHY)

SELF-AWARENESS: a positive goal of most training techniques that aim at behavior change. Self-awareness means becoming aware of one's existing patterns of behavior in a way that allows one to compare these with other behavior patterns without reacting defensively.

SELF-CONCEPT: refers to the picture one holds of oneself. This is a collection of feelings, hopes, and beliefs that would be difficult to define. A major object of self-awareness is to identify one's self-concept more accurately and completely.

SELF-INSTRUCTIONAL PACKAGES: packages that contain all the instructional materials needed for independent study of a course.

SEMINAR: a type of discussion group, usually led by a recognized expert who engages in a discussion among a group of trainees studying a specialized topic. The leader generally opens the seminar with a brief presentation, often covering provocative issues, and then guides a discussion in which all trainees participate.

SENSITIVITY TRAINING: methods for improving the individual's sensitivity to himself and others. Although variations exist, common ingredients seem to be: (1) the guidance of a trained person or persons; (2) intense interpersonal experience by the trainee; (3) a relatively protected environment, free from ordinary pressures and distractions.

SEQUENCE: the order in which different aspects of the instructional program are presented.

SESSION: an ambiguous term that usually refers to a portion of a training program, e.g., "the morning session," "the first day's session." Generally, it is used to refer to a period of time of a day or less.

SET: a preparatory adjustment or readiness for a particular kind of action or experience.

SHORT COURSE: a period of intensive training on a specific subject, usually simpler and less concentrated than courses taken for college credit, but having more depth that the single meeting.

SIMULATED TASK ANALYSIS: identification of job performance requirements in an artificial setting (e.g., in a class) using knowledge of jobs and the imagination.

SIMULATION: a contrived educational experience, in audiovisual or model form, that has the characteristics of a real-life situation. Simulation allows the trainee to make decisions or take action in a laboratory setting prior to interacting with people and things in a real-life situation. Examples include driver/trainer simulators, and educational "games" such as monopoly, Blacks and Whites, or CLUG (Community Land Use Game) that require actions by the trainees.

SKILL: technical expertness, proficiency; the ability to use one's knowledge effectively and readily in performing or executing something; a developed aptitude or ability.

SKILL-BUILDING: refers to anything that promotes proficiency or expertness.

SKIT: a brief, rehearsed, dramatic presentation involving two or more trainees. Working from a prepared script, the trainees act out an event or incident that dramatizes a situation.

STRATEGY: a planned series of activities that involves the choice of one approach over another.

STRUCTURAL: pertaining to the structure of an organization as it is described in organizational charts, job descriptions, and task assignments.

STRUCTURED EXPERIENCE: an experience that is designed to achieve a certain purpose. The written design must include a goal statement, a description of the process, a notation of group size and time and materials required, and a description of the physical setting.

SUMMATIVE TESTING: (See EVALUATION)

SUPPORT PERSONNEL: those persons who provide assistance in the training effort. They may be in the areas of recruitment, field services, accounting, facility management, material procurement, A-V, library, public relations, evaluation, and research.

SYMPOSIUM: a series of prepared lectures given by two to five resource people, each speaker presenting one aspect of the topic. The presentations should be brief and to the point, and should generally not exceed 25 minutes.

SYSTEM: an organized assemblage of interrelated components designed to function as a whole to achieve predetermined objectives.

SYSTEMS APPROACH: a manner of designing and evaluating systems that minimally includes specification of objectives in measurable terms, restatement of objectives in terms of capabilities and constraints, development of possible approaches, selection of appropriate approaches as a result of a tradeoff study, integration of the approaches, and evaluation of the effectiveness of the system in attaining objectives.

SYSTEMS THEORY (GENERAL SYSTEMS THEORY): describes the relationship between complex interacting components and organized wholes. (See OPEN-LOOP and CLOSED-LOOP SYSTEMS)

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TARGET AUDIENCE: that portion of the total learner population selected for exposure to instruction. This group is generally identified in terms of certain common social and/or learning characteristics.

TASK GROUP: a group of people who work together to complete a specific task.

TASK LEADER: a role that commonly emerges in any group, the task leader is the person who exercises the most influence on the way the group attempts to accomplish its main task.

TASK-ORIENTED: mostly interested in accomplishment of the task.

TEACHING: is the term commonly used to indicate face-to-face instruction. Teaching is usually subject-oriented, whereas training is problem-oriented--designed to solve a specific problem.

TEACHING/LEARNING SYSTEMS: these include telecture-electrowriter, all forms of television and radio, programmed instruction and teaching machines, compressed speech, dial access information retrieval systems, computer-assisted instruction, and other newer teaching/learning devices in support of a training program.

TEAM: a number of persons associated together in work or activity.

TEAM-BUILDING: improving relations within a group or team.

TECHNICAL ASSISTANCE: the provision of technical services in response to a request.

TECHNIQUE: activities that are used as a tool within a certain method. More general in nature than exercises, techniques are not an end in themselves. Examples are brainstorming, using a fishbowl, pairing, and using audiovisual aids.

TECHNOLOGY: a standardized, communicable way of achieving a practical purpose. It is used increasingly in organization development to refer to ways of making interventions, as in "team-building technology."

TERMINAL OBJECTIVE: (See BEHAVIORAL OBJECTIVE)

THERAPY: an activity that has as its purpose the improvement of the physical and/or mental functioning of a person.

TRAINER: one who conducts training. This te[illegible] may also be applied to one who develops a training program. Tra[illegible]ers should be able to conduct needs assessments, develop training [illegible]onduct and evaluate training.

TRAINING: a sequence of experiences, a series of opportunities to learn in which one is exposed in a more or less systematic way to certain materials or events.

TRAINING ACTIVITIES: the actual learning experience to which a trainee is exposed during training. Training activities can include use of different methods and techniques such as: guided-group discussions, buzz groups, written exercises, lectures.

TRAINING AIDS: these convey information and ideas to trainees by appealing to their senses of sound, sight, and touch. Training aids can greatly facilitate the learning process. Some examples are flip charts, overhead projectors, etc.

TRAINING DESIGN: a detailed, step-by-step plan that describes how learning will take place during the training. It is an arrangement of methods into a detailed plan for a training session. A functional training design should include: (1) behavioral objectives; (2) what the trainee will learn--the topic to be covered, task to be performed, or activity to be undertaken; (3) how the trainee will learn--description of the methodology; (4) time alloted for accomplishing the methodology; and (5) materials and/or equipment needed.

TRAINING MATERIALS: (See MATERIALS)

TRAINING PACKAGE: (See INSTRUCTIONAL PACKAGE)

TRAINING PROCESS: Includes four phases--needs assessment, development, delivery, and evaluation.

UNIT OF INSTRUCTION: a unit of instruction is a planned series of learning activities or experiences that has: (1) predetermined, stated objectives; (2) a definite beginning and a definite end; (3) a specified learner population; (4) some specified means of assessing the learning that has taken place as a result of the interaction between the learner and the unit of instruction. Although no particular length is prescribed for a unit of instruction, it is usually thought of as shorter in length than a course.

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VALIDATE: to confirm the soundness of; to verify.

VALIDATED INSTRUCTION: instruction that has been shown to do what it was intended to do.

VALIDATION: the process of developmental testing, field testing, and revising a training activity to be certain its behavioral objectives are achieved.

VALUING: showing preference for selected activities; becoming committed.

WORKSHOP: a training method that permits extensive study of a specific topic. Fifteen to twenty people meet together to improve their proficiency, to collectively develop new operating procedures, or to solve problems.

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AUDIENCE: This is a basic course, designed for trainers in the substance abuse field who are involved in training but who lack apprenticeship in training theory, design, and delivery.

CONTENT: The Trainer's Manual consists of ten modules covering the following topics: introduction to learning theory, interpersonal communication and the group process, needs assessment and behavioral objectives, designing training activities, small-group presentations, individual presentations, evaluation, trainer intervention and how to use training materials.

METHODOLOGY: Lectures, demonstrations, guided group discussions, small-group exercises, individual reading assignments, and presentations.

COURSE MATERIALS: Trainer's Manual
Resource Manual

TIME REQUIREMENTS: This course is designed to be delivered in five days, the average module requiring three and one-half hours.